ANCILE
uPerform™

User Manual

Managing Content with ANCILE uPerform™

Version 4.5

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Chapter 1: Introduction

ANCILE uPerform provides authors and administrators with a robust content development, delivery, and management environment. From recording and editing functionality through secure check in, check out, workflow, and website deployment, ANCILE uPerform expedites your development and delivery of training materials.

What is ANCILE uPerform?

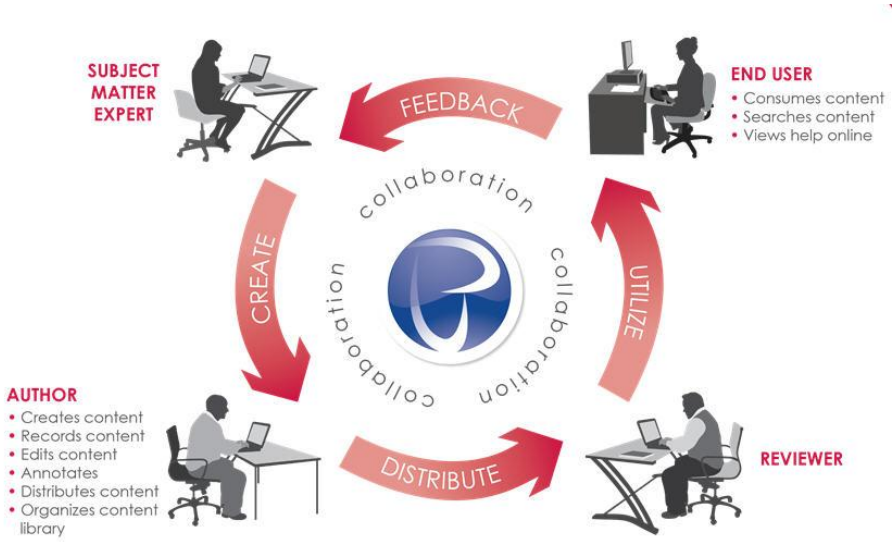
The ANCILE uPerform application is a content development and delivery tool designed to enable authors and administrators to create, manage, and distribute documents, simulations, and eLearning courses. Specifically, ANCILE uPerform allows authors and content administrators to:

- ❒ Create, edit, and manage content
- ❒ Collaborate within the authoring team to review content and share information
- ❒ Incorporate content in an electronic performance support system (EPSS) website and online help
- ❒ Solicit and receive feedback from users
- ❒ Deliver content personalization features such as subscriptions and favorites to authors and users

To manage content, authors and administrators can leverage check in/checkout, versioning, workflow, and collaboration functionality. Users can access content via a standard web browser or mobile device, provide feedback to authors, and collaborate with other users to share knowledge.

The ANCILE uPerform application consists of two parts:

- ❒ Editor: used to record, create, and edit content.
- ❒ Server: used to configure and manage the document library, website, glossary, and workflow functionality.



About This Manual

This manual provides details regarding the administration of content. Information about the authoring of content is provided in the companion manual *Creating Content with ANCILE uPerform*. Information about the technical administration of uPerform, including server installation and configuration, is provided in the companion manual *ANCILE uPerform Administration*.

Who Should Read This Manual

This manual includes overview information and step-by-step procedures for administrators who manage documentation and training materials delivery to users. Administrators have the following rights and responsibilities:

- ❒ Participate in an approval workflow for content.
- ❒ Receive and evaluate feedback from other authors and users.
- ❒ Create the document library and website hierarchies.
- ❒ Create and manage user accounts.
- ❒ Establish project-wide settings such as workflow and template usage.
- ❒ Manage editing rights: a system administrator has editing rights over the entire uPerform installation; a project administrator has editing rights for one or more projects within the uPerform installation.

In addition, this manual also references the end user who accesses content via online help or a performance support website, shares content links with other users, and provides feedback to authors.

Organization Of This Manual

Chapters 2 through Chapter 13 and Appendix A contains information intended for the administrator or project administrator. This manual also contains a glossary with terms and definitions relevant to the concepts discussed within this manual.

Conventions Used In This Manual

The following conventions are used in this manual:

Style	Description
Bold	Indicates a field name, button name, or an option. Example: Click **General** on the left pane.
Italic	Indicates a screen or window title. Example: The *Step Properties* window is displayed.
SMALL CAPS AND GREATER THAN SYMBOL (>)	Indicates a menu path. Example: Select **START > PROGRAMS > ANCILE UPERFORM**.
	Indicates an important concept or a caution.
	Indicates a helpful hint or amplifying information.

Available Technical Support

In addition to the online help delivered with uPerform, ANCILE offers several additional support mechanisms:

- The ANCILE Product Support Center is available at https://ancile.parature.com.
- Optional instructor-led training. For additional information about our training services, contact your sales representative.

Chapter 2: Getting Started

The ANCILE uPerform server workspace provides access to several functions, including project and user account creation, workflow setup, glossary and publishing maintenance, reporting, website setup, configuration, and customization.

Introduction to Managing Content

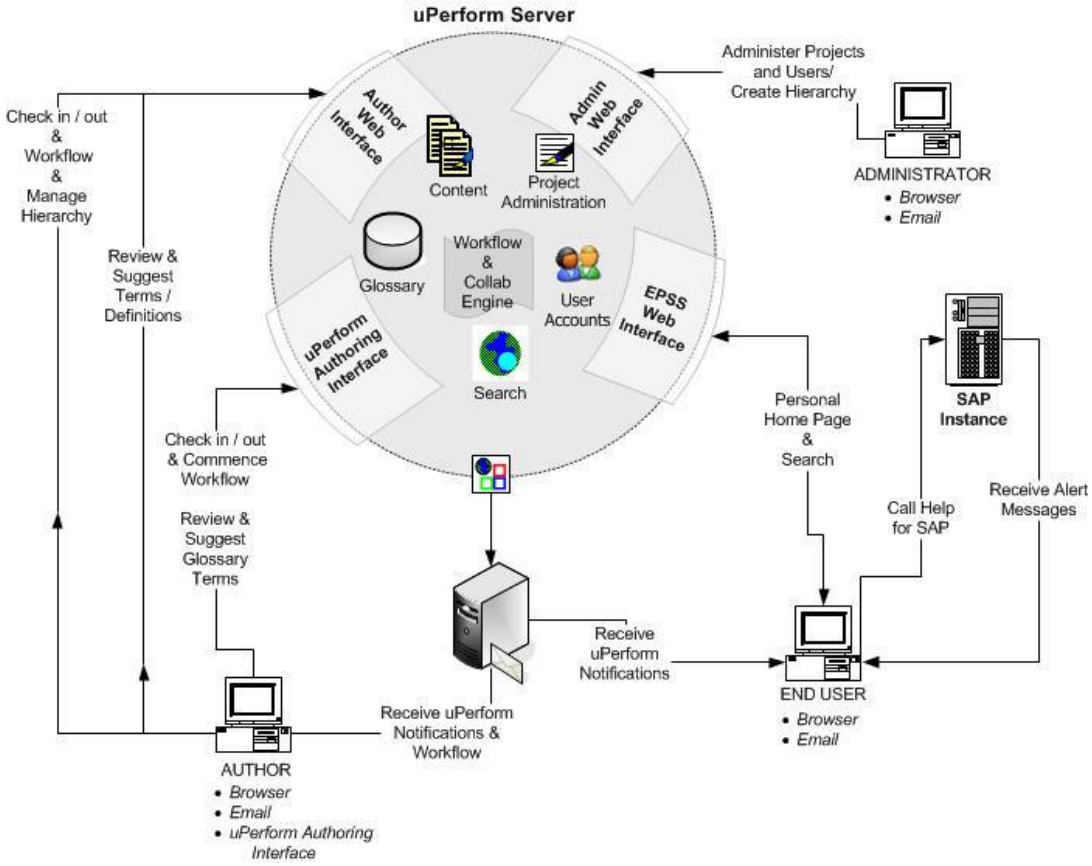
The uPerform server interface is available via the Internet Explorer or Mozilla Firefox web browsers. The procedures in this manual will assume you are using Internet Explorer.

The following functionality is available via the server workspace:

- ❒ Create favorites, subscriptions, and 'tell others' notices
- ❒ Participate in discussions
- ❒ Create and maintain user accounts
- ❒ Manage role and group assignments
- ❒ Create and maintain projects, document libraries, and websites
- ❒ Create and maintain the glossary
- ❒ Create and maintain publishing settings
- ❒ Create workflow routings
- ❒ Generate reports

Refer to the *ANCILE uPerform Administration* manual for instructions on installing and configuring the server and customizing the end user website.

The following diagram illustrates the major functions of the uPerform server and how the server supports the activities of the author, end user, and administrator.



Accessing the Server Workspace

The system administrator typically provides authors and project administrators with an account and access rights to the server.

For detailed instructions on creating users, refer to Managing Users, Roles, and Groups (on page 29).

Logging Into the Server

1. Enter your uPerform server URL in your web browser **Address** field to display the *Welcome* window.

   If you are using Windows Authentication Single Sign-On (SSO), you must enable uPerform as a trusted site in your web browser via the browser security options menu in order to display the uPerform website.

2. Perform one of the following options:

If You Want To	Then
Explore the server workspace via a single sign-on (SSO) connection	Refer to Exploring the Server Workspace (on page 17).
Log into the server	Go to Step 3.

3. Click **Log In** to the right of **Welcome, Anonymous**.

4. Enter your user name and password.

5. Click **OK**.

6. Perform one of the following actions:

If You Want To	Then
Log into the server for the first time.	Go to Step 7.
Explore the server workspace.	Refer to Exploring the Server Workspace (on page 17).

7. Complete the following fields:

Field	Description
Time Zone	Select your time zone from the **Time Zone** drop-down list to ensure the correct date and time display on objects within the server.
Language	Select a language from the **Language** drop-down list to ensure the desired interface language displays when you are working in the server.

8. Click **Save**.

Retrieving Your Password

If you click **Cancel** on the login screen, the *Help Desk* window is displayed. Password retrieval does not apply if SSO is enabled.

1. Click **Reset Password** on the left menu of the server workspace.
2. Enter your username.
3. Click **OK**.
4. Click **OK** on the confirmation page.

Your password will be emailed to you.

Requesting a New User Account

1. Click **Log In** to the right of **Welcome, Anonymous**.
2. Click **Cancel** on the Login screen.
3. Click **Request User Account** on the left menu of the server workspace.
4. Complete the following fields:

Field	Description
First Name	Enter your first name.
Last Name	Enter your last name.
Password	Choose a password.
Password confirmation	Confirm the password.
Language	Select a language from the drop-down list.

Field	Description
E-Mail Address	Enter your email address. This is where you will receive all notifications from the ANCILE uPerform server.

The administrator receives this notification in the Help Desk screen available from the server workspace and can act on the request to create a new account.

Managing Your Account

Your account includes information such as your name, password, time zone, language, and email address.

Editing Your Account Information

1. Click **My Account** on the left menu of the server workspace.
2. Click **Edit Properties** on the left menu.

3. Edit the following fields:

If your uPerform user accounts are synchronized, you cannot change the first name, last name, password, or email.

Field	Description
First Name	Edit the text of the first name.
Last Name	Edit the text of the last name.
Password	Enter a new password. You should choose a password that is a combination of alphabetic and numeric characters and one that is not a word found in a standard dictionary. Your password cannot be blank, and it cannot contain double-byte characters.
Password Confirmation	Re-enter the new password to confirm your entry.
Timezone	Select your time zone from the drop-down list.
Language	Select your interface language from the drop-down list. For an end user account, this will also set the user's language for use in content filtering of website documents based on language.
Email Address	Edit your email address.

4. Click **Save**.

If you changed your password, you will be prompted to sign into the uPerform server using your new password.

Getting Help on the uPerform Server Workspace

The uPerform server **About** link provides detailed information regarding the server version. The uPerform server **Help** link provides access to online help and the ANCILE Product Support Center.

Viewing uPerform Server Product Information

1. Click **About** on the left menu of the server workspace.
2. Review the following information:

Option	Description
Server Version	Displays the installed version of the uPerform server.
Copyright	Displays uPerform copyright information.
Third Party Information	Displays copyright information for third-party products included in ANCILE uPerform.

Accessing Help for the Server

1. Click **Help** on the left menu of the server workspace.
2. Select a help document hyperlink to display help.

Accessing the Product Support Center

1. Click **Help** on the left menu of the server workspace.
2. Click **ANCILE uPerform Support** to access the ANCILE Product Support Center.

Exiting

You do not need to logout of the uPerform server. However, if you have multiple uPerform web browser windows open, closing a single browser window only ends the session for that window. You must close all open instances of your supported web browser in order to log out of the uPerform server.

Chapter 3: Exploring the Server Workspace

The ANCILE uPerform server workspace is available to both authors and administrators via a supported web browser.

Introduction to the uPerform Server Workspace

The server workspace allows authors to:

- ❒ Manage personal account information
- ❒ Create favorites and subscribe to content
- ❒ Review and approve a list of content within a workflow
- ❒ Create and participate in workflow
- ❒ Participate in collaboration discussions
- ❒ Assign content to website contexts

In addition, the following specific administrator functionality is provided:

- ❒ Create and update projects, document libraries, and websites
- ❒ Import a document library structure
- ❒ Create and manage users, roles, and groups
- ❒ Configure glossary and publishing settings
- ❒ Create and manage workflows
- ❒ Configure settings for a Learning Management System (LMS) to be used in conjunction with eLearning courses
- ❒ Generate reports

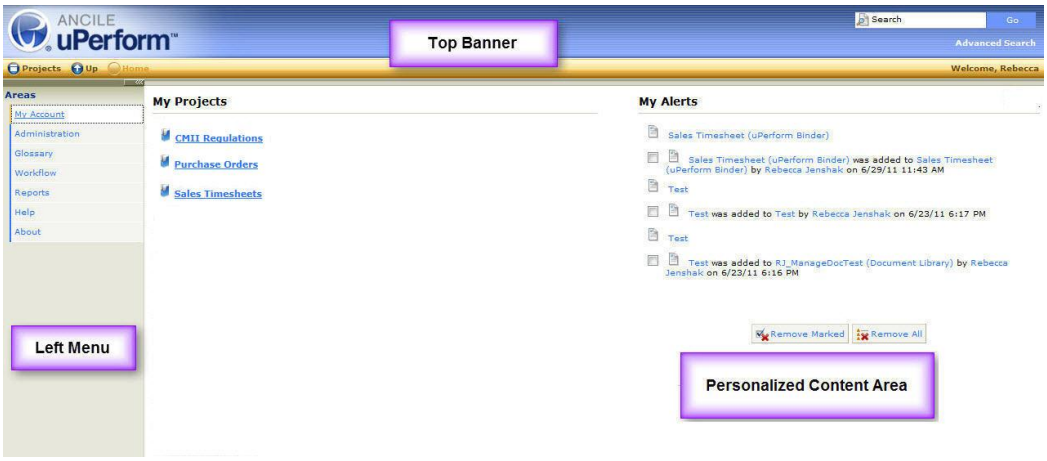
Administrators can also customize the end user website. For more information, refer to the companion manual *ANCILE uPerform Administration*.

The server workspace is accessed via a standard web browser. Your home page within the workspace is called your personal page.

Using the Server Workspace

Your uPerform personal page is divided into three main areas:

- ❒ The top banner: Contains search functionality.
- ❒ The left menu: Contains navigation buttons and options pertinent to your current location and system access in uPerform.
- ❒ Your personalized content area: Displays your favorites list, projects to which you are assigned, any workflow items requiring your attention, and a list of alerts received as a result of subscribing to content.



Using the Top Banner

The top banner provides access to search functionality to allow you to execute a quick search using one or more words or a document type. Advanced searches can be performed within a project. Search results include a hyperlink to the found object(s). The uPerform search engine incorporates stemming to maximize search results. In other words, when you search for the word "relate," the search will also find documents, emails, discussion topics, and folders with the word "related."

In addition, skip links are available when a screen reader is being used in conjunction with uPerform or when you are using keyboard navigation. Skip links allow you to skip to the main content on the page or to the left menu.

Executing a Search

The following is a partial list of the file formats indexed by uPerform:

- ❒ Microsoft Office formats
- ❒ Adobe Acrobat .pdf format
- ❒ HTML formats, including .htm and .html
- ❒ XML formats, including .xml, .xsd, and .xsl
- ❒ ASCII .txt format

Exact match searches must be enclosed in quotation marks. For example: "Entering a timesheet". In addition, you can search for content containing Boolean operators, such as AND, OR, and NOT. In Boolean searches, phrases with spaces must be contained in parentheses ( ). For Example (transaction code) AND (last modified).

An exact match search (search text enclosed in quotations marks) and a Boolean search (search text with boolean keywords AND, NOT, OR) cannot be executed at the same time. A single search can only be an exact match or a Boolean search.

1. Perform one of the following options:

If You Want To	Then
Perform a basic search	In the top banner, enter a word or words in the Search textbox. Click **Go** to display the Search Results window. Go to Step 4.
Perform an advanced search	In the top banner, click **Advanced Search**. Go to Step 2.

2. Complete the following fields:

Field	Description
Terms	Enter a word(s), wildcard, and/or Boolean operator.
Type	Select the content on which you would like to perform a search. For example: uPerform document.
Location	Select the project on which you would like to perform the search.

3. Click **Search**.

4. Review the list of search results and, as desired, click on a result hyperlink to display the content page.

Using Skip Links

Skip links are available when a screen reader is being used in conjunction with uPerform or when you are using keyboard navigation.

If you are using a screen reader, skip links are the first objects a screen reader will recognize. If you are using keyboard navigation, the links will display when you press the tab key and bring focus to the links.

1. Perform one of the following options:

If you want to	Then
Skip to the main content.	Select **Skip to main content** when the screen reader announces it or when the link is focused after tabbing.
Skip to the left menu	Select **Skip to navigation** when the screen reader announces it or when the link is focused after tabbing.

Using the Left Menu

The left menu area contains both server navigation buttons and a list of options relevant to your location, task, and system access.

Using the Navigation Buttons

The following buttons are available throughout the server workspace. Your specific location in the website will affect whether a particular button is active.

Button	Description
	Click this button to go to the top level of uPerform. The top level displays a list of all uPerform projects to which you have access.
	Click this button to move up one level from your current location. The use of the browser Back button is not recommended.
	Click this button to go to your personal page.

Using the Left Menu Options

The options available on the left menu will vary based upon your location in the system and your system access. The menu is divided into three sections: actions, areas, and inform. The left menu can be collapsed to increase screen real estate.

The following options are available within the three sections on the left menu:

Option	Description
Action entries	Available actions will vary based on your current area and system access. Examples of action entries include: **Assign Website Context** and **Start Workflow**.
My Account	Select this option to view or edit your account details (including your password) and subscriptions. For more information, refer to Editing Your Account Information (on page 13).

Option	Description
Administration	Select this option to maintain system configuration settings, configure publishing and glossary settings, customize the website, and maintain users, roles, and groups. For more information on system configuration settings and website maintenance, refer to the *ANCILE uPerform Administration* manual. For more information on server publishing, refer to Publishing Content from the Server (on page 129). For more information on users and groups, refer to Managing Users, Roles, and Groups (on page 29).
Glossary	Select this option to view the glossary. For more information, refer to Working with the Glossary (on page 165).
Workflow	Select this option to display links for creating and managing workflows. For more information, refer to Using Workflow (on page 143).
Recycle Bin	Select this option to manage the recycle bin of deleted content. There is one Recycle Bin per project. For more information, refer to Managing the Recycle Bin (on page 108).
Reports	Select this option to generate document tracking, workflow, workflow status, and custom reports. For more information, refer to Using Reports (on page 197).
Help	Select this option to view or configure help documents available for uPerform. For more information, refer to Accessing Help for the Server (on page 15).
About	Select this option to view version details and third-party information on the uPerform server. For more information, refer to Viewing uPerform Server Product Information (on page 15).
Add to My Favorites	Select this option to add the current content, folder, or discussion to your list of favorites. Your favorites are displayed in the **My Favorites** list on your personal page. For more information, refer to Using the My Favorites List (on page 25).
Subscribe/Unsubscribe	Select this option to receive or stop alerts regarding changes to the current content, folder, or discussion. Your alerts are displayed in the **My Alerts** list on your personal page. For more information, refer to Using the My Favorites List (on page 25).
Edit Subscription	Select this option to specify preferences for receiving subscription notifications.
Tell Others	Select this option to send specified users a link to the current content, folder, or discussion. For more information, refer to Using the Tell Others Feature (on page 163).

Option	Description
Add Me to Discussion/Remove Me from Discussion	Select the option to participate in author or website discussions. For more information, refer to Subscribing to a Discussion (see "Subscribing to a Folder or Discussion" on page 160).

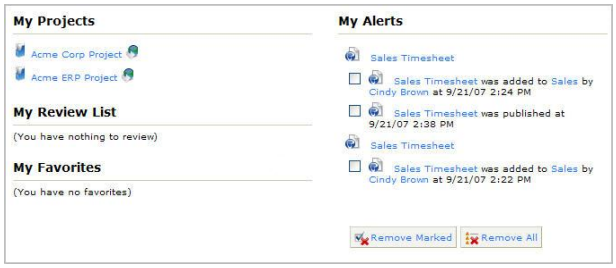
Expanding and Collapsing the Left Menu

The display of the left menu can be collapsed to increase available screen real estate. The setting for the left menu is linked to the user's account. Consequently, the browser will remember your selected menu setting between browser sessions.

To collapse or expand the left menu, click the arrow icon below the website navigation buttons. When an end user displays context-sensitive help, the left menu is always collapsed.

Using Your Personal Page

Your personal page contains your personalized information.


My Projects
Acme Corp Project
Acme ERP Project
My Review List
(You have nothing to review)
My Favorites
(You have no favorites)
My Alerts
Sales Timesheet
Sales Timesheet was added to Sales by Cindy Brown at 9/21/07 2:24 PM
Sales Timesheet was published at 9/21/07 2:38 PM
Sales Timesheet
Sales Timesheet was added to Sales by Cindy Brown at 9/21/07 2:22 PM
Remove Marked
Remove All

The following lists are available on every author and administrator personal page:

- My Projects: Displays links to all projects to which you have access. From this list, the website view of the project is also available.
- My Review List: Displays content currently in a workflow assigned to you. The five most recent links, based on the modification date, are displayed. To display all links, click **More...**.

- ❒ My Favorites: Displays links to content, discussions, or folders that you have added to your list of favorites. The five most recent links, based on the modification date, are displayed. To display all links, click **More...**.

- ❒ My Alerts: Displays notifications about changes to content to which you have subscribed. You can remove all or selected notifications from your personal page. To display all links, click **More...**.

Using the My Projects List

Your **My Projects** list displays those projects to which you have been granted access by the administrator. Typically, these are the projects to which you are contributing or reviewing content. From the **My Projects** list, you can access both the document library and the end user views of the projects to which you have author rights.

1. Select one of the following options to view details about a project:

If You Want To	Then
Display the document library view of a project	Click on the name of the project in the **My Projects** list. For detailed information on document libraries, refer to Working With the Document Library (on page 63).
Display the end user view of a project	Click to the right of the project in the **My Projects** list. Optionally, click the **View as End User** link in the left pane on any project, folder, or document cover page. For detailed information on websites, refer to Working With the Website (on page 111).

2. For detailed information on creating projects, see Populating the Document Library (on page 76).

Using the My Review List

Your **My Review List** displays content currently in a workflow assigned to you. To view a workflow item in your review list:

1. Click on the document name in the **My Review List** to go to the document page.

2. Click **I Approve** or **I do not Approve** in the *Workflow* portion of the window.

Using the My Favorites List

Your **My Favorites** list displays content you have bookmarked. To create a favorite to display in the list:

1. Navigate to the content item, discussion, or folder that you want to bookmark.

2. Click **Add to My Favorites** on the left menu to add the favorite to the list on your personal page.

Using the My Alerts List

Your **My Alerts** list displays links to content to which you have subscribed. If you want to receive notifications about changes to content or folders in uPerform, you can subscribe to the object. Changes made to the content will initiate a message being sent to the subscriber.

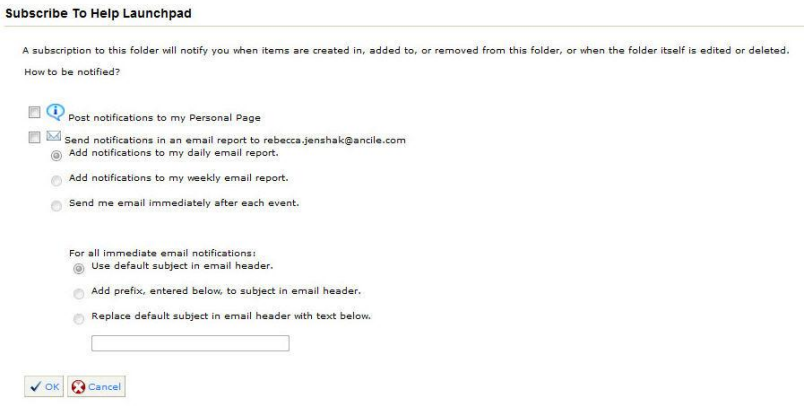
You can select how you are notified of changes: via email or via a link on your personal page.

The document author is automatically subscribed to documents (and the related discussions) the author adds to the server. This notification is sent via email and a link on your personal page.

Subscribing to Content

1. Navigate to the content item, discussion, or folder to which you want to subscribe.

2. Click **Subscribe** on the left menu.


Subscribe To Help Launchpad
A subscription to this folder will notify you when items are created in, added to, or removed from this folder, or when the folder itself is edited or deleted.
How to be notified?
Post notifications to my Personal Page
Send notifications in an email report to rebecca.jenshak@ancile.com
Add notifications to my daily email report.
Add notifications to my weekly email report.
Send me email immediately after each event.
For all immediate email notifications:
Use default subject in email header.
Add prefix, entered below, to subject in email header.
Replace default subject in email header with text below.
OK
Cancel

3. Select one or more of the following options:

Option	Description
Post notifications to my Personal Page.	Select this option to receive your subscription notification in the **My Alerts** section of your uPerform personal page.
Send notifications in an email report to [your email address].	Select this option to receive your subscription notification via email message. Specify one of the following email notification types: daily, weekly, or immediately after an event. If you specify an immediate email notification, you can elect to use the default subject in the email subject line, add a prefix to the default subject, or replace the default subject with custom text.

4. Click **OK**.

When the content is changed in the future, you will receive a notification on your personal page and/or an email message. Subscription email messages contain a link to the changed content.

Subscriptions to content within dynamic website folders will notify you when the folder is renamed, subfolders are added or removed, or the search filter is changed; however, due to the filters applied to this type of folder, you will not be notified when documents are added, updated, or removed from the folder. End users are unable to subscribe to dynamic website folders.

For more information on dynamic website folders, refer to Building the Website via Dynamic Website Folders (on page 119).

Editing and Stopping a Subscription

1. Click

to go to your personal page.

2. Click **My Account** on the left menu.

3. Click **My Subscriptions** on the left menu to display a list of your subscriptions.

4. Select one of the following options:

If You Want To	Then
Unsubscribe to a listed item	Click **Unsubscribe** below the item name. Click **OK** in the following confirmation window.
Edit your subscription to a listed item	Click **Edit Subscription** below the item name. Change your notification option(s), and click **OK**.

Chapter 4: Managing Users, Roles, and Groups

ANCILE uPerform manages access to content on the server via user accounts and role assignments. User accounts can be created for end users, authors, and administrators. Users are assigned to one of three main roles, which provide access to particular projects. Groups are optional and can be used to filter specific end user access to content on the website.

User, role, and group management tasks are performed by a system administrator.

Introduction to Managing Users, Roles, and Groups

Three types of users are available in uPerform: end user, author, and administrator. Within the administrator designation there is a further subgrouping of administrators:

- System administrator: has administrative access to the entire uPerform instance.
- Project administrator: has administrative access to one or more projects within the uPerform instance.
- Glossary administrator: has administrative access to glossary functionalities.
- Publishing administrator: has administrative access to publishing functionalities.

Roles are used to determine administrator and author access to content within the server, and also to set up end user access to projects that are published on the website. Groups are an optional functionality that can be used to restrict content access to a subset of users specified by the administrator.

The end user population can access uPerform content via one of two account types:

- Anonymous: No login to the uPerform website is required. If users access the website anonymously, they will not have access to personalization options such as subscriptions and favorites. An anonymous user can request an account. This request sends a message to the Help Desk folder on the server. The system administrator can act on this request to create a named account.
- Named: The system administrator can create a named user account and assign the user to specific groups and roles within uPerform.

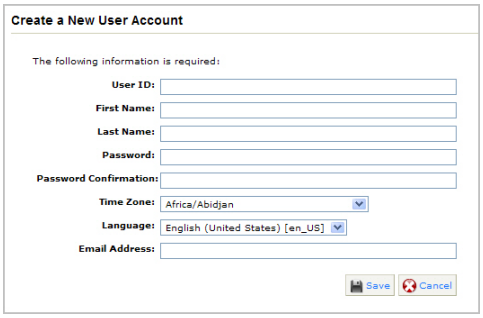
Manually Creating and Updating User Accounts

User accounts are created and then assigned to one or more project roles to provide access to the project. Each project within uPerform has three roles associated with the project: administrator, author, and user. These three roles are automatically created for each project upon project creation. If a user is not part of one of these roles for a project, he will not see the project and its contents when logged into uPerform unless an administrator has enabled anonymous access for that project.

Only system administrators can create user accounts. Each user account must have a unique identifier and a unique email address. You can create user accounts in two ways: manually or by synchronizing via a directory server or file source. For more information on synchronization, refer to Creating and Managing Users Via User Information Source (on page 37).

Adding a User

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Users** in the *Users, Roles, and Groups* area.
4. Click **Add New User** on the left menu.



5. Complete the following required fields:

Field	Description
User ID	Enter the user's account identification. Ligatures are not supported. For example: æ
First Name	Enter the user's first name. Ligatures are not supported. For example: æ
Last Name	Enter the user's last name. Ligatures are not supported. For example: æ

Field	Description
Password	Enter the user's password. The password cannot be blank. Only US ASCII characters 32-126 are allowed. Double-byte characters are not supported.
Password Confirmation	Re-enter the new password to confirm your entry.
Time Zone	Select the user's time zone from the drop-down list.
Language	Select the desired interface language from the drop-down list. For an end user account, this will also set the user's language for use in content filtering of website documents based on language.
Email Address	Enter the user's email address.

6. Click **Save**.

When the user account is created, the user is automatically assigned to the All Users group within uPerform.

A manually-created user will receive an email from the administrator. This email contains the user's ID and password. The user can log into the server to change the first and last name, the password, update the email address, and specify the local time zone and preferred locale. To customize the email notification, refer to "Working with Phrases" in the companion manual *ANCILE uPerform Administration*.

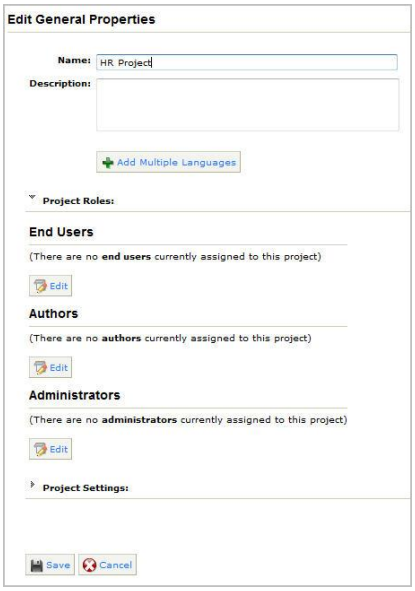
Assigning a User to a Project Role

The minimal uPerform role you should assign to a user interacting with the server from the client is Author. This ensures the user will have access to server functionality associated with creating content.

1. Click **Projects** on the upper left.

2. Select the project to which the user will be added.

3. Click **Edit Properties** on the left menu.



4. Click **Edit** below the role to which the user will be assigned.

5. Perform one of the following options:

If You Want To	Then
Assign project roles manually	Click **uPerform Users**. Click **All Users**. Perform a search or click on the first letter of the last name of the desired user, select the user name, and click **Add Selected**.
Assign a group of users to the end user role	Click **uPerform Groups**. Click the checkbox next to the group(s) you want to assign to the project role.

6. Click **OK**.

7. Click **Save**.

Finding a User

1. Click **Administration** on the left menu.

2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **Users** in the *Users, Roles, and Groups* area.

4. Enter any part of the user's name into the search field, or click **All Users** to search all users in the uPerform server.

   If you imported users via a user information source, you can search for any attribute that has been mapped into uPerform. For more information, refer to Adding a User Information Source from a Directory Server (on page 38).

5. Click **Find**.

Updating a User Account

Users synchronized via a file source can change passwords. Users synchronized via a directory server cannot change passwords. For more information, refer to Creating and Managing Users Via User Information Source (on page 37).

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Users** in the *Users, Roles, and Groups* area.
4. Enter any part of the user's name into the search field.
5. Click **Find**.
6. Select the user from the list.
7. Choose from the following options:

If You Want To	Then
Edit user information	Click **Edit User** in the left menu of the server workspace. Edit the user account information.
Edit the user ID	**Edit User ID** in the left menu of the server workspace. Edit the user ID. This option is available only for manually created users.

8. Click **Save**.

Deleting a User Account

When you delete a user, the following actions occur:

- ❒ The user status is changed to 'inactive', and the user is no longer available from the address book.
- ❒ The user is removed from all discussions, roles, and groups, and the user's subscriptions and notifications are deleted.

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Users** in the *Users, Roles, and Groups* area.
4. Enter any part of the user's name into the search field.
5. Click **Find**.
6. Select the user from the list.
7. Click **Delete** on the left menu of the server workspace.
8. At the prompt, click **OK**.

Recovering a User Account

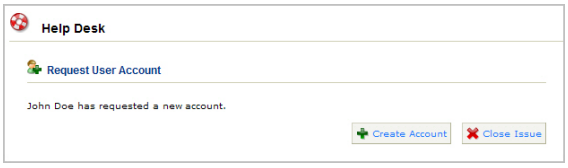
1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Users** in the *Users, Roles and Groups* **area**.
4. Click **Deleted Users** on the left menu.
5. Select the name of the deleted user.
6. Click **Recover User** on the left menu.

Recovered users are not added back into roles nor are they resubscribed to discussions or notifications.

Responding to a Request for a User Account

An anonymous user can request an account. This request sends a message to the Help Desk on the server. The administrator can act on this request to create an account. To expedite the processing of these account requests, the administrator should subscribe to the Help Desk folder.

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Help Desk** in the *Users, Roles, and Groups* area.



4. Click **Create Account** below the name of the requestor to go to the *Create User* window.

For detailed instructions on creating a user account, refer to Adding a User (on page 31).

Unlocking a User Account

A user can be locked out of an account when an invalid number of logon attempts occur. Users can still access the uPerform client in disconnected mode, but will only have anonymous access to the server until the account has been unlocked.

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups**.
3. Click **Help Desk**.
4. Click **Unlock Account** under **Request Unlock Account** for the user.

Creating and Managing Users Via User Information Source

User information sources allow you to import and synchronize users from an external data source. This is useful if you have a globally diverse directory management system and want to import and synchronize your users with uPerform.

User information source functionality allows you to:

- ❒ Import and synchronize user accounts in bulk via an XML-formatted file.
- ❒ Import and sync user accounts from one or more directory servers.
- ❒ Access your user account identification policies such as special characters, spaces, and domains.
- ❒ Sync a specific segment of a user base in a directory or file source via a filter, and assign users to groups within uPerform.

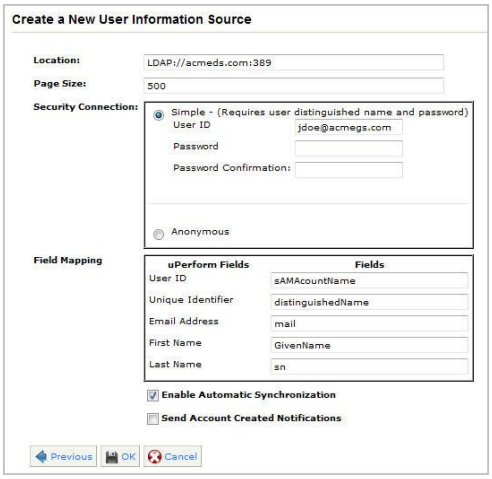
Four steps are required for synchronizing users:

- ❒ Create the user information source, which is a connection to a user store. The user source can be an LDAP-compliant directory server, such as Microsoft Active Directory or a well-formed XML file. Multiple user information sources can be created to allow you to import users into uPerform from different locations. Refer to the *ANCILE uPerform Technical Specifications* for a complete list of the supported directory servers.
- ❒ Create the filter, which allows you to retrieve a specific set of users from the user information source and assign the users to a content group. Filters for a directory server are LDAP queries; filters for XML user sources are XPath queries. Multiple filters can be created for each user information source.
- ❒ Assign the filter to a group, which allows you to assign access to content within uPerform. If a filter is not assigned to a group, new users will not be imported to uPerform and any existing users will be deactivated in uPerform if they are not included within any other filters. If you are not utilizing group-based filtering, the filter must be assigned to the **All Users** group.
- ❒ Run the synchronization from the user information source, filter, or groups page. Alternatively, the synchronization can be scheduled to run automatically. For more information on scheduling tasks, refer to "Scheduling Automated Tasks" in the companion manual *ANCILE uPerform Administration*.

Working with User Information Sources

Adding a User Information Source from a Directory Server

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Sources** in the *Users, Roles, and Groups* area.
4. Click **Add User Source** on the left menu.
5. Enter a name for the source in the **Name** field.
6. Enter a description of the source in the **Description** field.
7. Select **Directory Server** from the source drop-down list.
8. Click **Next**.



9. Complete the following required fields:

Field	Description
Location	Enter the URL for the directory server. For example: LDAP://acmeDS.com:389
Page Size	Enter the number of records to retrieve at one time. If your director server supports page size limits, ensure your page size is within that range. If the directory server does not use paging, enter -1. Page size should not be set if the directory server does not provide an estimated number of results.

Field	Description
Security Connection	Select the **Simple** or **Anonymous** radio button. If you choose simple, enter the user name and password of the user to use to connect to the directory server.
Field Mapping	**User ID**: Enter the property name from the directory server. **Unique Identifier**: Enter the property name from the directory server. **Email Address**: Enter the property name from the directory server. **First Name**: Enter the property name from the directory server. **Last Name**: Enter the property name from the directory server.
Enable Automatic Synchronization	This option allows you to automatically synchronize filters created for this user source. This will allow you to quickly synchronize from a specific user source when a new file is uploaded, file is updated on the web, changes are made to the directory server, or changes are made to the field mapping. It is recommended that you leave this option disabled until you are ready to synchronize user accounts. For more information on automatic synchronization, refer to "Schedule Automated Tasks" in the companion manual *ANCILE uPerform Administration*.
Send Account Created Notifications	This option enables the uPerform server to send an email to a user the first time the account is synchronized. ANCILE recommends enabling this option when using XML files as the user source to ensure you receive password information sent via email.

10. Click **OK**.

Adding a User Information Source from a File Source

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Source** in the *Users, Roles, and Groups* area.

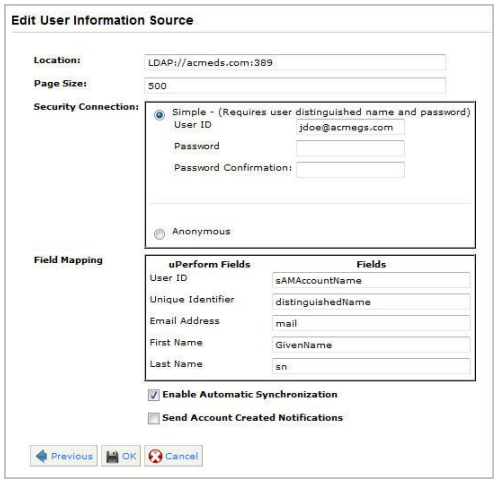
4. Click **Add User Source** on the left menu.

5. Enter a name for the source in the **Name** field.

6. Enter a description of the source in the **Description** field.

7. Select **File** from the **source** drop-down list.

8. Click **Next**.



9. Perform one of the following:

Field	Description
Upload a file	Select the **Upload File Path** radio button, and select **Browse ...** to navigate to the file location. Go to Step 10.
Connect to a file over HTTP	Select **Connect to a File** and complete the following fields: **Path**: Enter the static path for the file to which you want to connect. **User ID**: Enter the User ID that has access to the file. **Password**: Enter the password for the user. **Password Confirmation**: Confirm the password.
Field Mapping	**User ID**: Enter the XPath string from the user element in the file to the user ID. **Unique Identifier**: Enter the XPath string from the user element in the file to the unique identifier. This allows uPerform to update the user if it is changed in the directory server or file source. **Email Address**: Enter the XPath string from the user element in the file to the email address.

Field	Description
	First Name: Enter the XPath string from the user element in the file to the user's first name. **Last Name**: Enter the XPath string from the user element in the file to the user's last name.
Enable Automatic Synchronization	This option allows you to automatically synchronize filters created for this user source. This will allow you to quickly synchronize from a specific user source when a new file is uploaded, file is updated on the web, changes are made to the directory server, or changes are made to the field mapping. It is recommended that you leave this option disabled until you are ready to synchronize user accounts. For more information on automatic synchronization, refer to "Schedule Automated Tasks" in the companion manual *ANCILE uPerform Administration*.
Send Account Created Notifications	This option enables the uPerform server to send an email to a user based on their event notification settings.

10. Click **OK**.

Editing User Information Source Properties

A user source cannot be edited if a filter assigned to it is synchronizing.

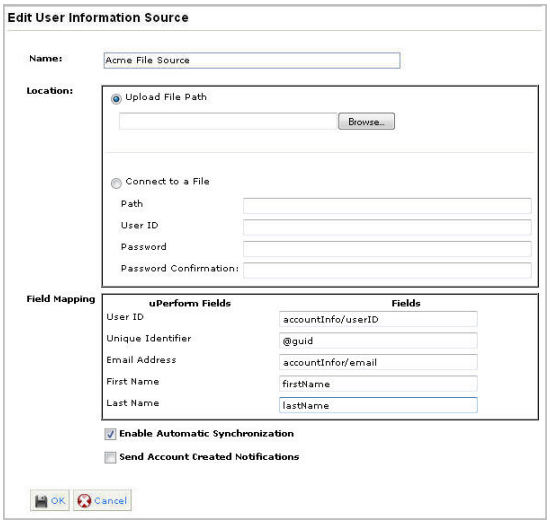
1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Sources** in the *Users, Roles, and Groups* area.
4. Click on the **[User Source]** hyperlink.
5. Select **Edit Properties** from the left menu.
6. Choose from the following options:

If You Want To	Then
Edit a user information source from a Directory server	Go to Step 7.
Edit a user information source from a file	Go to Step 9.

7. Complete the following fields:

Field	Description
Location	Enter the URL for the directory server.
Page Size	Enter the number of records to retrieve at one time. If your director server supports page size limits, ensure your page size is within that range. If the directory server does not use paging, enter -1. Page size should not be set if the directory server does not provide an estimated number of results.
Security Connection	Select the **Simple** or **Anonymous** radio button. If you choose simple, enter the user name and password of the user to use to connect to the directory server.

8. Go to Step 10.



9. Choose from the following options:

If You Want To	Then
Upload a file	Select **Upload File Path,** and select **Browse ...** to navigate to the file location.
Connect to a file over HTTP	Select **Connect to a File**, and complete the following fields: **Path**: Enter the static path for the file to which you want to connect. **User ID**: Enter the User ID that has access to the file. **Password**: Enter the password for the user. **Password Confirmation**: Confirm the password

10. Complete the following fields:

Field	Description
Field Mapping	**User ID**: For a directory server, enter the property name from the directory server. For a file source, enter the XPath string from the user element in the file to the user ID. **Unique Identifier**: For a directory server, enter the property name from the directory server. For a file source, enter the XPath string from the user element in the file to the unique identifier. This allows uPerform to update the user if it is changed in the directory server or file source. **Email Address**: For a directory server, enter the property name from the directory server. For a file source, enter the XPath string from the user element in the file to the email address.

Field	Description
	First Name: For a directory server, enter the property name from the directory server. For a file source, enter the XPath string from the user element in the file to the user's first name. **Last Name**: For a directory server, enter the property name from the directory server. For a file source, enter the XPath string from the user element in the file to the user's last name.
Enable Automatic Synchronization	This option allows you to automatically synchronize filters created for this user source. This will allow you to quickly synchronize from a specific user source when a new file is uploaded, file is updated on the web, changes are made to the directory server, or changes are made to the field mapping. It is recommended that you leave this option disabled until you are ready to synchronize user accounts. For more information on automatic synchronization, refer to "Schedule Automated Tasks" in the companion manual *ANCILE uPerform Administration*.
Send Account Created Notifications	This option enables the uPerform server to send an email to a user based on their event notification settings.

11. Click **OK**.

Deleting a User Information Source

A user source cannot be deleted if a filter assigned to it is synchronizing.

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Sources** in the *Users, Roles, and Groups* area.
4. Click on the **[User Source]** hyperlink.
5. Select **Delete User Source** on the left menu.
6. Click **OK**.

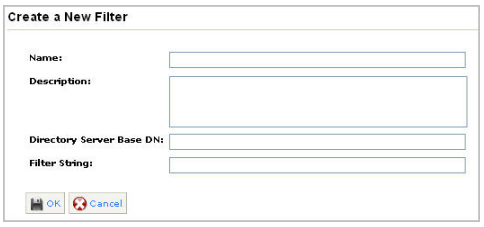
Clicking OK will delete the user source, its filter(s) and any users belonging to the filter(s), unless the users belong to another filter.

Working With User Information Source Filters

Filters are used to synchronize a specific segment of a user base in a directory server or file source to groups within uPerform.

Adding a User Information Source Filter

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Sources** in the *Users, Roles, and Groups* area.
4. Select the **[User Source]** hyperlink.
5. Select **Add Filter** on the left menu



6. Complete the following fields:

Field	Description
Name	Enter a name for the filter.
Description	Enter a description for the filter.
Directory Server Base DN	Enter the Directory Server Base DN. Example: OU=uPerform, DC=acme, DC=com This option is not available if your user information source is created from a file.
Filter String	For a directory server, enter an LDAP query. Example: (&(objectClass=user)(memberOf=CN=HumanResourses,OU=Groups,,OU=uPerform,DC=acme,DC=com)) For a file user source, enter the XPath query to the user. Example: /users/user[@group='HR']

7. Click **OK**.

8. To activate the filter, apply it to a group. For more information, refer to Assigning Content to a Group (on page 61).

   If a filter is not assigned to a group, users in the filter will not be added into uPerform unless they are a member of another filter.

Editing a User Information Source Filter

A user source filter cannot be edited if it is synchronizing.

1. Click **Administration** on the left menu.

2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **User Information Sources** in the *Users, Roles, and Groups* area.

4. Select the [User Source] hyperlink.

5. Select the [Filter Name] hyperlink.

6. Select **Edit Properties**.

7. Complete the following fields:

Field	Description
Name	Edit the name for the filter.
Description	Edit the description for the filter.
Directory Server Base DN	Edit the Directory Server Base DN. Example: OU=uPerform, DC=acme, DC=com This option is not available if your user information source is created from a file.
Filter String	Edit the filter string. For a directory server, enter an LDAP (&(objectClass=user)(memberOf=CN=Human Resources,OU=Groups,OU=uPerform,DC=acme,DC=com)) For a file user source, enter the XPath query to the user. Example: /users/user[@group='HR']

8. Click **OK**.

   The filter is activated once it is applied to a group. To apply a filter to a group, refer to Creating a Group.

Deleting a User Information Source Filter

A user source filter cannot be deleted if it is synchronizing.

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Sources** in the *Users, Roles, and Groups* area.
4. Select the **[User Source]** hyperlink.
5. Select the **[Filter Name**] hyperlink.
6. Select **Delete Filter** on the left menu.
7. Click **OK**.

Members of the deleted filter will be removed from the groups to which the filter was assigned. If members are not assigned to another group within uPerform, the accounts will be deleted.

Synchronizing a User Information Source Filter

Administrators can synchronize accounts at a filter, directory server/file source, or server level. Synchronizing from the user source page will synchronize all filters associated to that user source. Synchronizing from the filter page will only synchronize that filter. Synchronizing from the Groups page will synchronize all user sources and filters. Before synchronizing, the filter needs to be assigned to a group. For more information, refer to Creating a Group.

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **User Information Sources** in the *Users, Roles, and Groups* area.
4. Click on the [User Source] hyperlink.

5. Choose from the following options:

If You Want To	Then
Synchronize all filters associated with the user information source	Go to Step 6.
Synchronize a single filter to add/update a specific group	Click on the [Filter Name] hyperlink, and go to Step 6.

6. Select **Synchronize** on the left menu.

7. Click **OK**.

Optionally, schedule automatic synchronization using ANCILE uSchedule. For more information, refer to "Schedule Automated Tasks" in the *ANCILE uPerform Administration* manual.

Subscribing to Synchronization Summary Notifications

1. Click **Administration** on the left menu.

2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **User Information Sources** in the *Users, Roles, and Groups* area.

4. Click the **[User Source]** hyperlink containing the user source you want to view.

5. Choose from the following options:

If You Want To	Then
Subscribe to events for all filters associated with a user information source	Go to Step 6.
Subscribe to events for a single filter	Click on the **[Filter Name]** hyperlink. Go to Step 6.

6. Click **Subscribe** on the left pane.

7. Choose from the following options:

Field	Description
Synchronization Succeeded	Check **Synchronization Succeeded** to be notified of synchronizations that are successful.
Synchronization Failed	Check **Synchronization Failed** to be notified of synchronizations that fail.

Field	Description
Post notifications to my Personal Page	Check **Post notifications to my Personal Page** to be notified of your selected events on your personal page.
Send notifications in an email report to current user	Check **Send notifications in an email report to [current user]** be notified of your selected events via email.

8. If **Send notifications in an email report to [current user]** is selected, select one of the following options:

If You Want To	Then
Receive event notifications in a daily email report	Select **Add notifications to my daily email report**.
Receive event notifications in a weekly email report	Select **Add notifications to my weekly email report**.
Receive event notifications immediately after event	Select **Send me an email immediately after each event**.

9. If **Send me an email immediately after each event** is selected, select one of the following options:

If You Want To	Then
Use default subject in immediate email notifications	Select **Use default subject in email header**.
Add a custom prefix to the subject in immediate email notifications	Select **Add prefix, entered below, to subject in email header**.
Enter a custom subject in immediate email notifications	Select **Replace default subject in email header with text below**.

10. If **Add prefix, entered below, to subject in email header** or **Replace default subject in email header with text below** is selected, enter text.

11. Click **OK**.

Stopping a User Synchronization

Synchronization can be stopped at the User Information source level, filter level, or group level. At the User Information source level the synchronization of any filters assigned to that user information source will be stopped if those filters are processing or waiting to process. At the filter level, only the synchronization for that filter will be stopped. At the group level, all processing and waiting synchronizations will be stopped.

1. Click **Administration** on the left menu.

2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Perform one of the following actions:

If You Want To	Then
Stop synchronization at the User Information Source level	Click **User Information Sources** in the *Users, Roles, and Groups* area. Go to Step 4.
Stop synchronization at the Filter level	Click **User Information Sources** in the *Users, Roles, and Groups* area. Click on a filter. Go to Step 4.
Stop synchronization at the Group level	Click **Groups** in the *Users, Roles, and Groups* area. Go to Step 4.

4. Click **Stop Synchronization** in the left pane under Actions.

5. Click **OK**.

Viewing the Synchronization Log

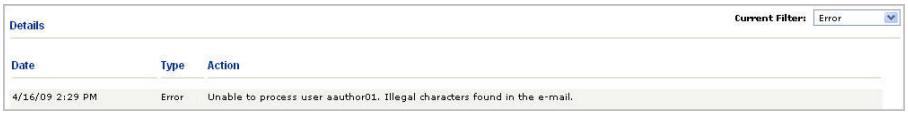
1. Click **Administration** on the left menu.

2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **User Information Sources** in the *Users, Roles, and Groups* area.

4. Click the **[User Source]** hyperlink containing the filter log you want to view.

5. Click **View Log** next the filter to view the log from the last synchronization.



6. From the **Current Filter** drop-down list, select one of the following options:

Field	Description
View All	Select View All to view all events in the log.

Field	Description
Information	Select one of the following Information options: **Information**: Select **Information** to view all added, updated, and removed users. **Added**: Select **Added** to view added users. **Updated**: Select **Updated** to view updated users. **Removed**: Select **Removed** to view removed users.
Warning	Select **Warning** to view warnings from the most recent sync.
Error	Select **Error** to view errors from the most recent sync.

Managing uPerform Roles

Roles are intended to identify a team of users with a common project, function, or activity. Role functionality allows you to restrict access to project functionality to specific users.

When a project is created, the following three roles are automatically created and associated with the project:

- End User: Members of the user role can view published content within the project website and participate in discussions associated with the content.
- Author: Members of the author role can populate content for the project.
- Administrator: Members of the administrator role can create document library and website hierarchies and workflows.

Access is cumulative for the roles. In other words, a member of the administrator role can perform all the actions of members of the user and author roles. A member of the author role can perform all actions of the user role.

In addition, there are three instance-wide server roles that are created upon installation of the uPerform server:

- uPerform Glossary Administrators: Members of the glossary administrator role can enable and disable the use of the central glossary and rich text in definitions, use the glossary queue and glossary history list, manage glossary terms and definitions, run imports and exports, and subscribe to glossary events.
- uPerform Publishing Administrators: Members of the publishing administrator role can enable and disable publishing conversion types for managed documents, use the publish queue and publish history list, and subscribe to publish events.
- uPerform System Administrators: Members of the system administrators role are automatically added to both the glossary and publishing administrators roles. (However, these members are not automatically removed from these roles if they are removed from the system administrators role.) Refer to the *ANCILE uPerform Administration* manual for details on using the system administrator role.

You cannot create or delete an instance-wide server role. However, you can modify a role to add or remove users. Only administrators can modify roles.

Assigning a User to the uPerform System, Glossary, or Publishing Administrator Roles

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **uPerform Roles** in the *Users, Roles, and Groups* area.
4. Perform one of the following actions:

Field	Description
Add a user to the uPerform System Administrators role	Click on **uPerform System Administrators**, and go to Step 5.
Add a user to the uPerform Glossary Administrators role	Click on **uPerform Glossary Administrators**, and go to Step 5.
Add a user to the uPerform Publishing Administrators role	Click on **uPerform Publishing Administrators**, and go to Step 5.

5. Click **uPerform Users**.
6. Click **All Users**.
7. Click on the first letter of the last name of the desired user or use the search functionality.
8. Select the user name.
9. Click **Add Selected.**
10. Click **OK**.
11. Click **Save**.

Modifying a Role

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **uPerform Roles** in the *Users, Roles, and Groups* area.
4. Click on the role you want to modify.
5. Select **uPerform Users** to display and select the role members.

6. Perform one of the following actions:

If You Want To	Then
Add a new user to the role	Refer to Assigning a User to the uPerform System, Glossary, or Publishing Administrator Roles (on page 53).
Delete a user from the role	Click **uPerform Users**. Go to Step 7.

7. Select the user from the **Selected** list.

8. Click **Remove**.

   Optionally, click **Remove All** to remove all users from the role.

9. Click **OK**.

10. Click **Save**.

Finding a Role

1. Click **Administration** on the left menu.

2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **uPerform Roles** in the *Users, Roles, and Groups* area to display a list of all roles in the uPerform system**.**

Creating and Updating Groups

Groups are an optional functionality within uPerform that can be used to restrict content access to a subset of users specified by the administrator. Group usage is not restricted to content within a single project or subfolder within a project; you can assign groups to content across multiple projects or subfolders in uPerform.

A group is created and then content is assigned to the group and made available for use on the end user website. Users are then assigned to a group so they can access the content. For more information on the end user website, refer to Working With the Website (on page 111).

The top-level group on the uPerform server is the default group to which every user is automatically assigned. This group is called ANCILE uPerform Workspace All Users; however, the name of this group may be different if it was changed during your server customization. If you have made customizations, look for the name of the top-level content group that displays on the Content Groups page. In order to restrict content access, you must create sub-level groups beneath the top-level group. Refer to the procedures in this section for instructions on how to create and manage groups.

Groups are manually created by the system administrator if group data is not imported from a directory server.

Creating a Group

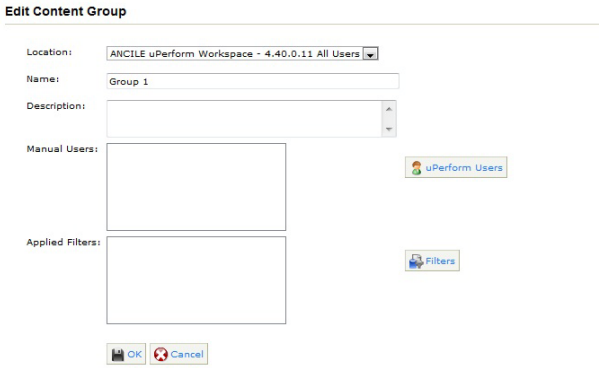
1. Click **Administration** on the left menu.
2. Click **Users, Roles and Groups** in the *Administration* area.
3. Click **Groups** under *Users, Roles and Groups.*

Groups
Click on a content group to add, edit, or delete a group.
Content Groups
ANCILE uPerform Workspace - 4.40.0.11 All Users
Group 1
Group 2

4. Click on the root group in the tree view.

You can create a subgroup by clicking on any group within the tree view.

5. Click **Add**.



6. Complete the following fields:

Field	Description
Name	Enter a name for the group.
Description	Enter a description for the group.

7. To add users to the group, click **uPerform Users**.

8. Click **All Users**.

9. Click on the letter of the last name(s) of, or search for, the user(s) you want to add to the group.

10. Select the user(s) from the list.

11. Click **Add Selected**.

12. Click **OK**.

13. To add filters to the group, click **Filters**.

You must add a filter to the group in order to synchronize users with the uPerform server. For more information on synchronization requirements, refer to Creating and Managing Users Via User Information Source (on page 37).

14. Select one or more filters from the **Available Filters** list.

15. Click **OK**.

16. Click **OK**.

Editing a Group

1. Click **Administration** on the left menu.

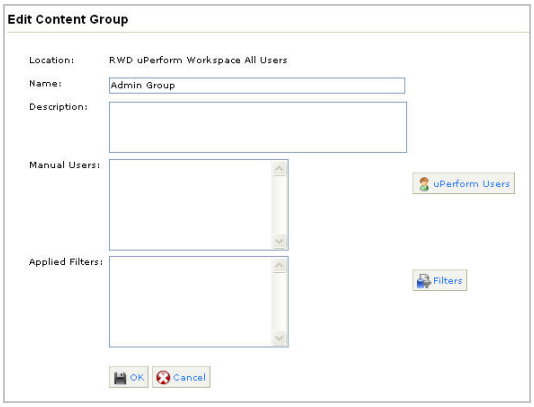
2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **Groups** under *Users, Roles, and Groups.*

Groups
Click on a content group to add, edit, or delete a group.
Content Groups
ANCILE uPerform Workspace - 4.40.0.11 All Users
Group 1
Group 2

4. Click on the group you want to edit.

5. Click **Edit**.



6. Review/complete the following fields:

Field	Description
Name	Edit the name for the group.
Description	Edit the description for the group.

7. To edit users in the group, click **uPerform Users**.

8. Click **All Users**.

9. Click on the letter of the last name(s) of, or search for, the user(s) you want to add to the group.

10. Select the user(s) from the list.

11. Click **Add Selected**.

12. Click **OK**.

13. To edit filters to the group, click **Filters**.

14. Select one or more filters from the **Available Filters** list.

15. Click **OK**.

16. Click **OK**.

17. Click **OK**.

Deleting a Group

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Groups** under *Users, Roles, and Groups.*

Groups
Click on a content group to add, edit, or delete a group.
Content Groups
ANCILE uPerform Workspace - 4.40.0.11 All Users
Group 1
Group 2

4. Click on the group you want to delete.

5. Click **Delete**.
6. Click **OK**.

This permanently deletes the group and any subgroup associated with the group. A deleted group or subgroup cannot be restored.

Viewing Users in a Group

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.

3. Click **Groups** under *Users, Roles, and Groups.*

Groups
Click on a content group to add, edit, or delete a group.
Content Groups
ANCILE uPerform Workspace - 4.40.0.11 All Users
Group 1
Group 2

4. Click on the group whose users you want to view.

5. Click **View Users**.

If more than 100,000 users are present in the group, the **View Users** button is disabled.

Synchronizing Groups

Synchronizing from the Groups page will synchronize all user sources and filters. For more information on user source, refer to Creating and Managing Users Via User Information Source (on page 37).

1. Click **Administration** on the left menu.
2. Click **Users, Roles, and Groups** in the *Administration* area.
3. Click **Groups** under *Users, Roles, and Groups.*

4. Click **Synchronize** on the left menu.
5. Click **OK**.

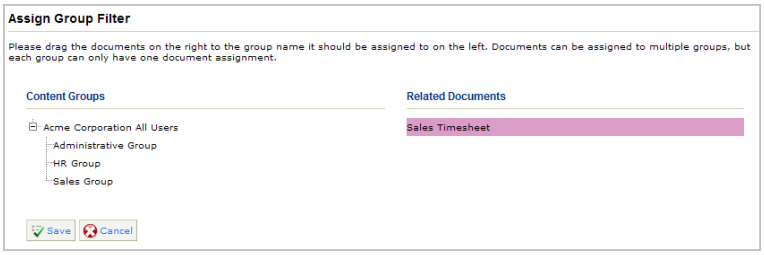
Assigning Content to a Group

You must first enable group-based filtering before assigning filters to content. For more information, refer to Specifying Project Settings (on page 72).

1. Click Projects on the upper left.
2. Select the project that contains the content for which you want to create a group filter.
3. Click **Document Library**.
4. Select the folder that contains the content for which you want to create a group filter.
5. Select the content for which you would like to create a group filter.

   This functionality is not available for managed documents.

6. Click **Assign Group Filter** in the left navigation bar.


Assign Group Filter
Please drag the documents on the right to the group name it should be assigned to on the left. Documents can be assigned to multiple groups, but each group can only have one document assignment.
Content Groups
Related Documents
Acme Corporation All Users
Administrative Group
HR Group
Sales Group
Sales Timesheet
Save
Cancel

7. Drag the content from the *Related Documents* list to the corresponding group in the *Content Groups* list.

8. Repeat Step 7 to add content to additional groups.
9. Click **Save**.

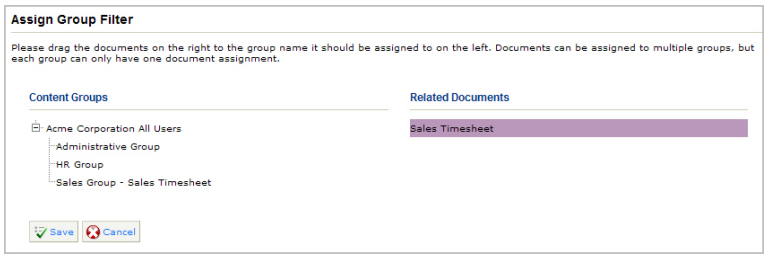
Deleting a Group Filter

1. Click Projects on the upper left.
2. Select the project that contains the group filter you want to delete.
3. Click **Document Library**.

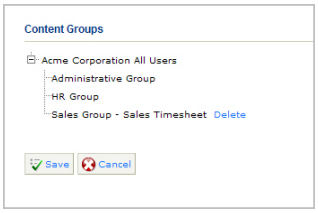
4. Select the folder that contains the group filter you want to delete.

5. Select the content for which you would like to delete a group filter.

6. Click **Assign Group Filter** in the left navigation bar.


Assign Group Filter
Please drag the documents on the right to the group name it should be assigned to on the left. Documents can be assigned to multiple groups, but each group can only have one document assignment.
Content Groups
Related Documents
Acme Corporation All Users
Administrative Group
HR Group
Sales Group - Sales Timesheet
Sales Timesheet
Save
Cancel

7. Scroll over the name of the content in the *Content Groups* list.



8. Click **Delete**.

9. Click **Save**.

Chapter 5: Working With the Document Library

Folders and content are stored in the document library on the ANCILE uPerform server. The document library allows the administrator to establish a meaningful folder hierarchy within a project. Authors, in turn, check content into these folders.

From the document library, authors and administrators can view document properties, add managed documents, and view document context and version history. The document library also provides centralized storage of all discussions.

Introduction to the Document Library

Each uPerform server contains one or more projects. These projects contain a logical collection of content called the document library. uPerform uses the document library to provide access to content for your authors. The website structure associated with each project provides end users with access to content on the website. For information on creating a website hierarchy, refer to Working With the Website (on page 111).

Administrator functions in the document library include:

- ❒ Create projects, folders and subfolders
- ❒ Create a workflow
- ❒ Add, assign, and update templates
- ❒ Relate documents
- ❒ Move content
- ❒ Assign group filters
- ❒ Set default translations
- ❒ Import a document library structure
- ❒ Add custom template reports to managed and web documents

Author functions in the document library include:

- ❒ Add managed and web documents
- ❒ Add a web document
- ❒ Add a message to a discussion
- ❒ View user discussion comments
- ❒ View document properties, including version history
- ❒ View usage statistics for a document
- ❒ Participate in a workflow

- ❒ Create an ad-hoc workflow
- ❒ Assign a website context to a folder and content

Creating the Project

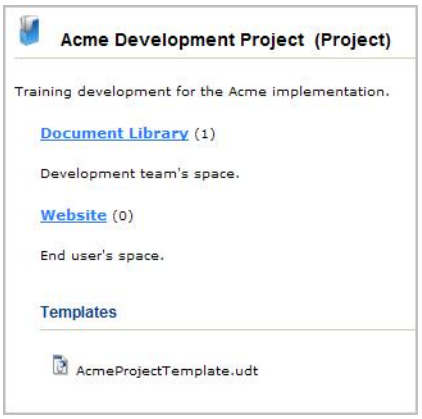
The uPerform server can contain one or more projects created by the system administrator. Each project contains the following two folders:

- ❒ Document library
- ❒ Website

Within the document library and website areas, you implement a custom hierarchy for your authors and end users, respectively.

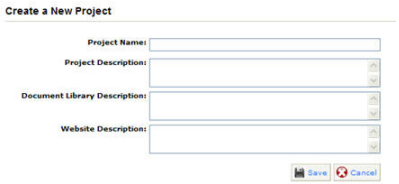
In addition to these two areas, each project has one or more assigned templates. A template can be used on multiple projects.

The following is an illustration of a typical project setup in uPerform.



Creating a Project

1. Log into the uPerform server via a web browser.
2. Click Projects.
3. Click **New Project** on the left menu.



4. Complete the following information:

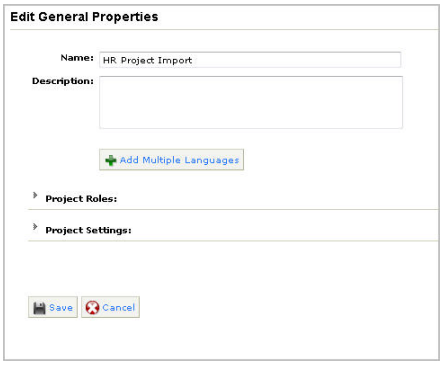
Field	Description
Project Name	Enter the name of the project.
Project Description	Enter amplifying information about the project and its purpose.
Document Library Description	Enter a description of the library associated with the project.
Website Description	Enter a description of the website associated with the project.

5. Click **Save** to display the project cover page.

Editing a Project

1. Log into the uPerform server via a web browser.
2. Click

.
3. Click on the name of the project to edit.
4. Click **Edit Properties** on the left menu.



ANCILE Info Pak Properties section is displayed on the *General Properties* form. For detailed information on incorporating Info Pak content, refer to Incorporating Info Pak Content (on page 329).

5. Edit the following information:

Field	Description
Name	Enter the name of the project.
Description	Enter amplifying information about the project and its purpose.

6. As needed, select one of the following options:

If You Want To	Then
Enable multi-language support to set a name and description of the project for any of the supported languages. This language-specific name and description will display based on the language preference set in the user's account.	Click **Add Multiple Languages**. Select a default language from the drop-down list. (This language will be displayed if the user's language is not available.) Click **Enable**. Go to Step 7.
Assign users to a role associated with the project	For detailed instructions on assigning a user to a role, refer to Assigning a User to a Project Role (on page 32).
Specify project settings	For detailed instructions on enabling anonymous access, refer to Specifying Project Settings (on page 72).

7. Enter a name and description for the required languages in your environment.

   From this screen you can also disable multiple language support.

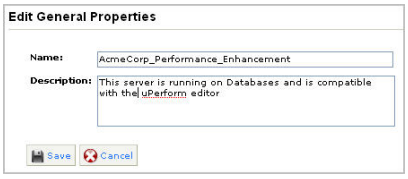
8. Click **Save**.

Editing the Displayed uPerform Server Name

Editing the displayed uPerform server name allows you to customize what your end users, authors, and administrators will see when they log onto the uPerform server.

1. Click Projects.

2. Click **Edit Properties** on the left menu.



3. Edit the following fields:

Field	Description
Name	Edit the name for the uPerform server.
Description	Enter or edit the description of the uPerform server.

4. Click **Save**.

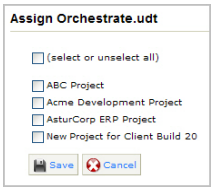
Working with Templates

uPerform server offers several options when working with templates:

- ❒ Assign a template to a project
- ❒ Version a template
- ❒ Roll back to a previous version
- ❒ Republish documents from an updated template

Assigning a Template to a Project

1. Click **Administration** on the left menu.
2. Click **Server Administration** in the *Administration* area.
3. Click **uPerform Templates** in the *Server Administration* area.
4. Click on the name of the template to be assigned to the project.
5. Click **Assign Template** on the left menu.
6. Select the checkbox next to the desired project(s) in the **Assign [Template Name].udt** window. Optionally, to assign a template to all projects in the list, click **(select or unselect all**).



7. Click **Save** to assign the template to the project(s).

Versioning a Template

1. In the client, open the template you want to update.
2. Select **FILE > CHECK IN > CHECK IN [TEMPLATE NAME]**.

3. Optionally, select the **Lock Template for Editing** checkbox.

4. Click **OK**.

Rolling Back to a Previous Template Version

Rolling back to a previous template version sets the version of the template used to publish content. Rolling back to a previous version permanently deletes the current version of the template from the server.

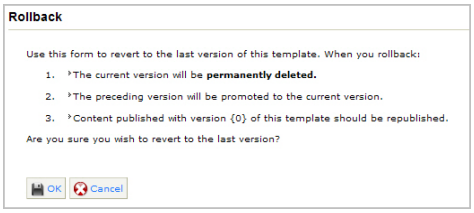
1. Click **Administration** on the left menu.

2. Click **Server Administration** in the *Administration* area.

3. Click **uPerform Templates** in the *Server Administration* area.

4. Select a template from the list.

5. Click **Rollback**.


Rollback
Use this form to revert to the last version of this template. When you rollback:
1. The current version will be permanently deleted.
2. The preceding version will be promoted to the current version.
3. Content published with version {0} of this template should be republished.
Are you sure you wish to revert to the last version?
OK
Cancel

6. Click **OK**.

7. Optionally, republish the documents associated with the template. For more information, refer to Republishing Documents (on page 132).

Viewing Template Properties

1. Click **Administration** on the left menu.

2. Click **Server Administration** in the *Administration* area.

3. Click **uPerform Templates** in the *Server Administration* area.

4. Perform one of the following options:

If You Want To	Then
View the template cover page	Select a template from the list.

If You Want To	Then
View the version history of the template	Select a template from the list. Click the **More** or **Hide** link to display or hide the version history. The link displays only if there are three or more versions of the template available.
Access an earlier version of a template	Select a template from the list. Click on the template hyperlink below *Version History*.
View a template	Select a template from the list. Open the template from the uPerform client as described in Using Author Templates (on page 211).

Specifying Project Settings

By setting anonymous access on a project, end users will not be required to login to the uPerform website when requesting help online. When anonymous access is enabled, the anonymous user and the All Users group will be added to the End User role.

By providing optional group-based filtering to a project, you can identify the content to which end users will have access. For more information, refer to Creating and Updating Groups (on page 55).

By limiting the number of major document versions that are stored per project, you can ensure your authors have access to current versions by eliminating any outdated versions. In addition, you can elect to remove additional versions, which can save space on the database server by removing unnecessary content. Major versions are designated by a 0 in the first decimal place of a version indicator (for example, 4.0).

A project administrator can specify assessment score tracking; as well as settings for authors, allowing them to create ad-hoc workflows, and allowing them to specify website context. A project administrator can also restrict check in, check out, delete, and rollback functionality to the owner or administrator for content assigned to them.

By default, projects do not automatically have the above options enabled.

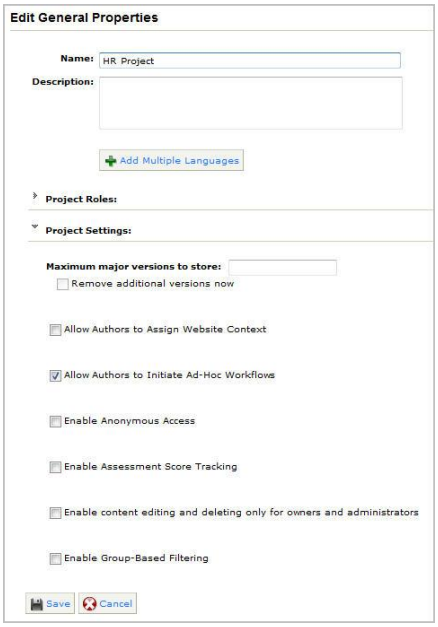
Enabling Project Settings

1. Click

on the left.

2. Click on the name of the project to edit.

3. Click **Edit Properties** on the left menu.



4. Choose from the following options:

Field	Description
Maximum versions to store	Enter the number of major versions to store on the server. The number must be greater than 0.
Remove additional versions now	Select this option to remove excess major versions. This option is available only if the Maximum major versions to store field contains a number greater than 0. This function permanently deletes non-inclusive versions from the database server.
Allow Authors to Assign Website Context	Select this option to allow authors to assign website context for the documents in this project.
Allow Authors to Initiate Ad-Hoc Workflows	Select this option to allow an author to enable an ad-hoc workflow.
Enable Anonymous Access	Select this option to enable anonymous access for the project.
Enable Assessment Score Tracking	Select this option to enable assessment score tracking for the project. Assessment scores are tracked for uPerform courses and simulations with templates that have SCORM 1.2 or SCORM 2004 packaging enabled. For more information, refer to *Specifying New Template Settings: Publications*.

Field	Description
Enable Content Editing and deleting only for owners and administrators	Select this option to restrict check in, check out, delete, and rollback functionality to the owner or administrator for content assigned to them.
Enable Group-Based Filtering	Select this option to enable group-based filtering for the project.

5. Click **Save**.

Deleting a Project

Deleting a project will delete all content in both the document library and website; all associated project groups; and the security policies, custom configurations, and modified properties of the project.

A deleted project is not sent to the recycle bin. A deleted project cannot be restored.

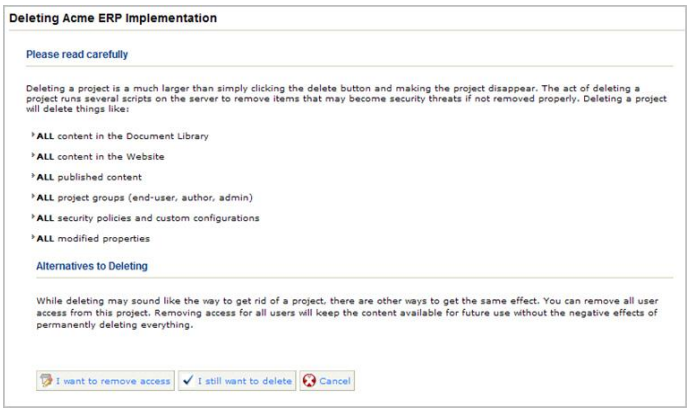
1. Click

.

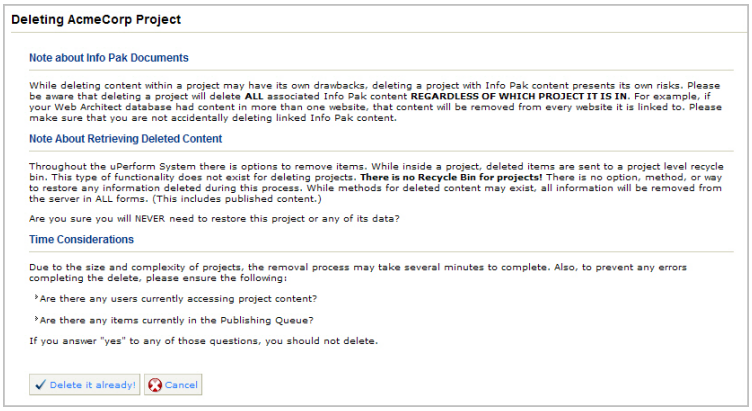
2. Click on the project name to go to the project cover page.

3. Click **Delete Project** on the left menu.

4. Read the instructions carefully to determine if you want to delete the project or simply remove access to the project.


Deleting Acme ERP Implementation
Please read carefully
Deleting a project is a much larger than simply clicking the delete button and making the project disappear. The act of deleting a project runs several scripts on the server to remove items that may become security threats if not removed properly. Deleting a project will delete things like:
ALL content in the Document Library
ALL content in the Website
ALL published content
ALL project groups (end-user, author, admin)
ALL security policies and custom configurations
ALL modified properties
Alternatives to Deleting
While deleting may sound like the way to get rid of a project, there are other ways to get the same effect. You can remove all user access from this project. Removing access for all users will keep the content available for future use without the negative effects of permanently deleting everything.
I want to remove access
I still want to delete
Cancel

5. Click **I still want to delete**.


Deleting AcmeCorp Project
Note about Info Pak Documents
While deleting content within a project may have its own drawbacks, deleting a project with Info Pak content presents its own risks. Please be aware that deleting a project will delete ALL associated Info Pak content REGARDLESS OF WHICH PROJECT IT IS IN. For example, if your Web Architect database had content in more than one website, that content will be removed from every website it is linked to. Please make sure that you are not accidentally deleting linked Info Pak content.
Note About Retrieving Deleted Content
Throughout the uPerform System there is options to remove items. While inside a project, deleted items are sent to a project level recycle bin. This type of functionality does not exist for deleting projects. There is no Recycle Bin for projects! There is no option, method, or way to restore any information deleted during this process. While methods for deleted content may exist, all information will be removed from the server in ALL forms. (This includes published content.)
Are you sure you will NEVER need to restore this project or any of its data?
Time Considerations
Due to the size and complexity of projects, the removal process may take several minutes to complete. Also, to prevent any errors completing the delete, please ensure the following:
Are there any users currently accessing project content?
Are there any items currently in the Publishing Queue?
If you answer "yes" to any of those questions, you should not delete.
Delete it already!
Cancel

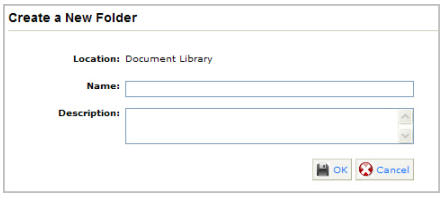
6. Click **Delete it already!**.

Populating the Document Library

After you have created the project, you are ready to create and populate, or import, the document library with a folder hierarchy.

Manually Adding a Folder to the Document Library

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Click **Add Folder** on the left menu.



5. Complete the following information:

Field	Description
Name	Enter the name of the folder.
Description	Enter amplifying information about the folder and its contents.

6. Click **OK**.
7. Repeat Step 4 through Step 6 to create additional folders and subfolders at the desired locations.

Import a Document Library Structure

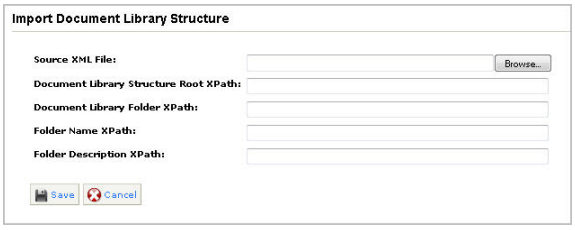
If you have an existing document library structure in a system such as ARIS or SAP Solution Manager, you can import this structure into a uPerform document library via an XML file to avoid losing or having to recreate the document library structure. You can simply import the structure to uPerform and begin populating your project. If you are working with double-byte characters, the file should be in UTF-8 double-byte format.

To import a library structure, your target project must have an empty recycle bin and an empty document library. A project or system administrator can import a structure.

Importing a Document Library Structure

1. Create or open a blank project.
2. Click **Document Library**.
3. On the left pane, click **Import Document Library**.

This option is disabled if the library contains content. Ensure the library is empty and that any content related to the library is deleted from the recycle bin.



4. Complete the following fields:

Field	Description
Source XML file	Click **Browse ...** and locate the XML file containing the document library structure you want to import.
Document Library Structure Root XPath	Specify an XPath query representing the root(s) of the Document Library structure.
Document Library Folder XPath	Specify an XPath query representing a Document Library folder. This is only searched from beneath the Document Library Structure Root XPath.
Folder Name XPath	Specify an XPath query representing the name of a Document Library folder. This is expected to be an attribute or sub-element of a node found by the Document Library Folder XPath.

Field	Description
Folder Description XPath	(Optional) Specify an XPath query representing the description of a Document Library Folder. This is expected to be an attribute or sub-element of a node found by the Document Library Folder XPath.

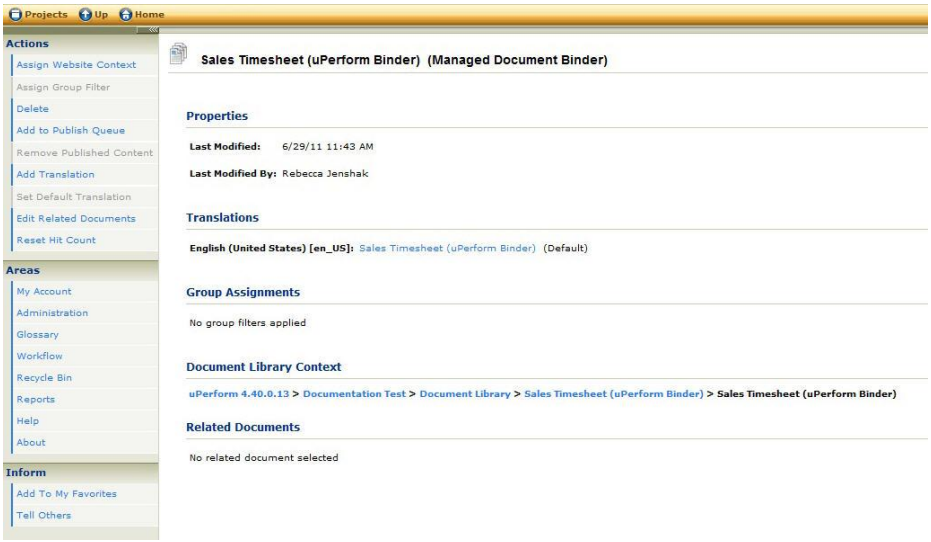
5. Click **Save**.

6. Click **OK** when the import is complete.

Browsing the Document Library

All uPerform content has an associated binder and a cover page. The uPerform binder contains multiple translations (if available) of a uPerform document. In the binder, the administrator can set default translations, assign group filters, and edit related documents. The actual content is filed in the *Translations* area of the binder.

The content hyperlinks within the *Translations* area will take you to the cover page that provides helpful information on document properties and status. From the cover page, the author can create a workflow, create and participate in discussions, and access versions.



Via standard hyperlink navigation, you can browse the document library and view the storage hierarchy and content objects.

You can also access the document library via the **TOOLS > LIBRARY/REPOSITORY** menu in the uPerform editor.

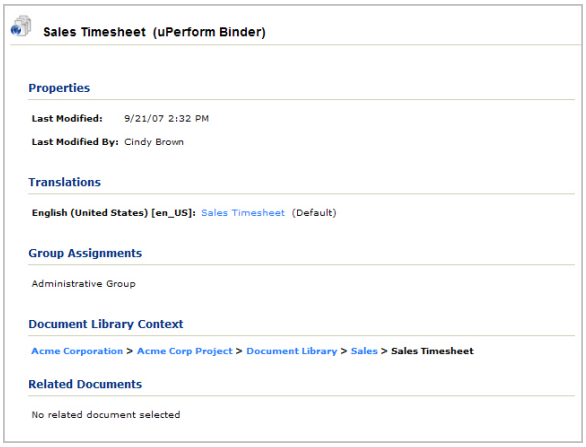
Navigating via the Document Library Context

A *Document Library Context* area is available on each binder and cover page. This area provides a hierarchical display of the content location in the document library. You can click on a hyperlink in the displayed hierarchy to navigate to another location in the document library.

Document Library Context
Collaboration Group Memory > Acme ERP Implementation > Document Library > Intranet > Sales_Order-Part1

Viewing a Binder

1. Click Projects.
2. Click on the name of the project in which the binder is stored.
3. Click **Document Library**.
4. Navigate to the folder in which the binder is stored.
5. Click on the name of the binder you want to view.

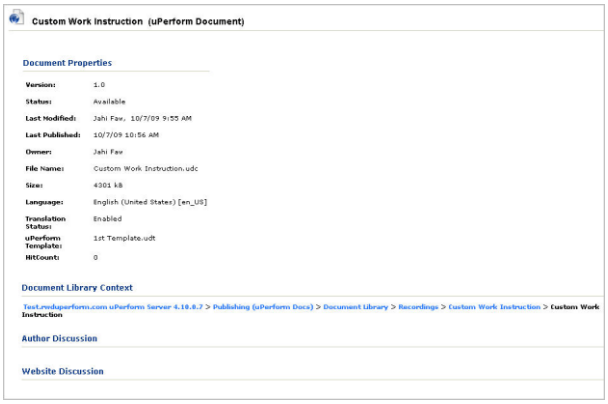

Sales Timesheet (uPerform Binder)
Properties
Last Modified: 9/21/07 2:32 PM
Last Modified By: Cindy Brown
Translations
English (United States) [en_US]: Sales Timesheet (Default)
Group Assignments
Administrative Group
Document Library Context
Acme Corporation > Acme Corp Project > Document Library > Sales > Sales Timesheet
Related Documents
No related document selected

6. Review the following information on the cover page:

Field	Description
Properties	Contains the date and time of the most recent modification and the name of the modifier.
Translations	Contains language of the content and, if applicable, associated translations.
Group Assignments	Contains the groups to which the binder has been assigned.
Document Library Context	The location of the binder in the document library.
Website Context (if applicable)	The location(s) in the website to which the binder is linked. For more information on specifying website context, refer to Assigning a Website Context to Document Library Content (on page 115).
Related Documents	Contains hyperlinks to other content you have related to this document.

Viewing a Cover Page

1. Click Projects.
2. Click on the name of the project in which the content is stored.
3. Click **Document Library**.
4. Navigate to the folder in which the content is stored.
5. Click on the name of the binder containing the content you want to view.
6. In the *Translations* section, click on the name of the content.



7. Review the following information on the cover page:

Field	Description
Version	The current version designator for this document. To view previous versions of the document, refer to the Version History area on the document cover page.
Status	Document locked by [name] - Indicates an author has locked this document against another author's edits. Available - Indicates this document is available for checkout and editing.
Last Modified	The date and time of the most recent modification and the name of the modifier.
Last Published	The date and time of the most recent publication.
Owner	The name of the original creator of the file.
File Name	The name of the file.
Size	The size of the file.
Language	The language of the content.
Translation Status	Displays if the translation is enabled for viewing on the end user website.

Field	Description
uPerform Template	Displays the uPerform template associated with the document.
Hit Count	Displays the number of views from the end user website. Hit count is determined per browser session when logged in as an end user or when accessing the server as an anonymous user. Hit count does not provide any information on user who accessed the document.
Workflow (if applicable)	If workflow has been initiated on this item, the workflow setting, status, and reviewer sequence is displayed in the upper right. For more information on workflow, refer to Using Workflow (on page 143).
Version History (if applicable)	If earlier versions of this item exist, the previous versions are displayed. You can rollback to the previous version to make that version the current version. For more information on versioning, refer to Using Version History (on page 101).
Document Library Context	The location in the document library in which the content resides.
Website Context (if applicable)	The location(s) in the website to which the content is linked. For more information on specifying website context, refer to Assigning a Website Context to Document Library Content (on page 115).
Author Discussion	Hyperlinks to discussion messages contributed by authors. For more information on author discussions, refer to Using Subscriptions Within a Discussion (on page 160).
Website Discussion	Hyperlinks to discussion messages contributed by end users. For more information on website discussions, refer to Using Subscriptions Within a Discussion (on page 160).
LMS Transactions	A history of alert messages received from a Learning Management System (LMS). **LMS Transactions** will display only if transactions exist on the LMS. For more information on publishing courses to an LMS, refer to Publishing Courses to an LMS (on page 135).

8. To return to the binder, click **Return to Binder** on the left menu.

Managing the Document Library

After you have established your document library structure, you can manage the structure and contents by updating folder properties, deleting folders, adding managed documents and web documents, changing document owners, and deleting documents.

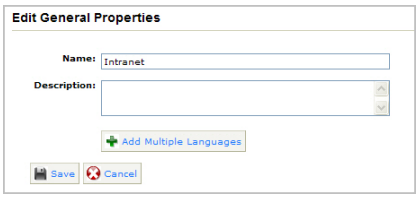
Managing Folders

Folders allow you to organize multiple documents within a project.

Updating Folder Properties

1. Click

in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Select the desired folder.
5. Click **Edit Properties** on the left menu.



6. Edit the following information:

Field	Description
Name	Edit the folder name.
Description	Edit the folder description.

Field	Description
Add Multiple Languages	Enable multi-language support to set a name and description of the folder for any of the supported languages. This language-specific name and description will display based on the language preference set in the user's account. Click **Add Multiple Languages**. Select a default language from the drop-down list. (This language will be displayed if the user's language is not available.) Click **Enable**.

From this screen you can also disable multiple language support.

7. Click **Save**.

Deleting a Folder

1. Click in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Select the desired folder.
5. Click **Delete Folder** on the left menu.

Deleting a folder will move both the folder and its contents to the recycle bin. For detailed information on managing the recycle bin, refer to Managing the Recycle Bin (on page 108).

6. Click **OK** at the confirmation prompt.

Managing Documents

The server workspace provides access to several document functions: adding a managed document, adding a web document, updating document properties, changing the document owner, and deleting a document.

ANCILE uPerform documents are added to the server via the editor workspace. You cannot add uPerform documents to the server via the server workspace.

A managed document can be a non-uPerform/non-Info Pak file that is either created on the server or an HTML document that is created directly from the uPerform server. uPerform now allows you to create a simple HTML-based document with a rich-text editor. The editor also allows you to see what the finished document will look like while the document is being created.

A web document is a link to a website or to a content location accessible via a unique web address. The managed document and web document functionality allows you to maintain all of your documentation and training file types and website links within the uPerform server.

A managed document is identified by a to the left of the document title in the document library. A web document is identified by a to the left of the document title in the document library.

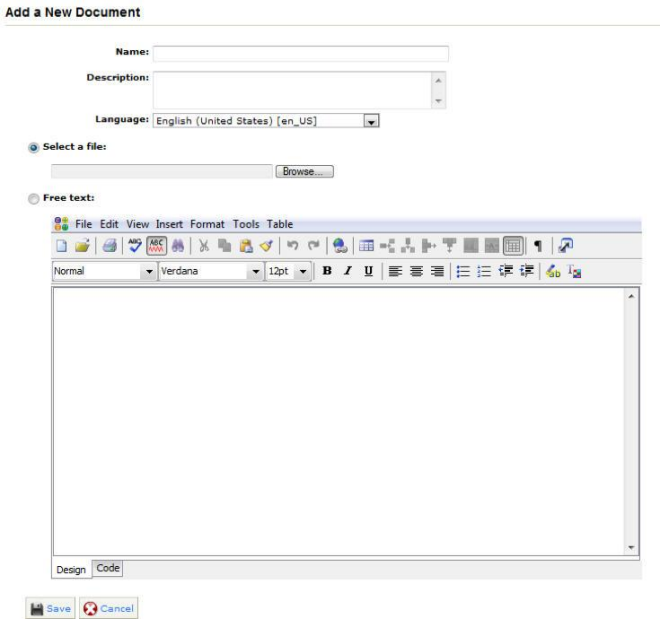
Web documents are not assigned to binders.

Administrators, authors with the proper privilege, or the owner with proper privileges may delete a document through the server workspace. When the document is deleted, the document is moved to the project's recycle bin. For detailed information on managing the recycle bin, refer to Managing the Recycle Bin (on page 108).

Adding a Managed Document

1. Click in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the folder in which the managed document will be stored.

5. Click **Add Managed Document** on the left menu.



6. Complete the following information:

Field	Description
Name	The default name is the name of the document. If desired, edit the name of the document.
Description	Enter amplifying information about the managed document.
Language	Select the appropriate language for the new document. The default is your website default language.

7. Perform one of the following:

If you want to	Then
Select a file (default)	To check in a file, click **Select a file** and click **Browse...**, to locate and select the managed document to upload.
Free Text	To add an HTML document, click **Free Text**. Enter text and format using the rich text editor toolbar controls.

You must have Java version 6 installed to enable uPerform's rich text editor.

8. Click **Save**.

Updating a Managed Document

1. Select the managed document.

If you want to	Then
Edit and upload a new file	Click **Get Latest Version**. Select **Lock**. Edit and save the document. Click **Check In**. Select the appropriate version number. Click **Browse...** Navigate to the new version of the managed document. Click **Open**.
Edit Rich Text HTML document on the server	Click **Lock.** Click **Edit Content**. Select the appropriate version number. Edit the content.

Selecting Lock allows you to prevent others from using the document while you are checking in a new version.

2. Click **Add Version**.

Updating the managed document with versions also gives you the ability to revert back to a previous version, if necessary.

3. Verify the updated version is available.

Adding a Web Document

1. Click

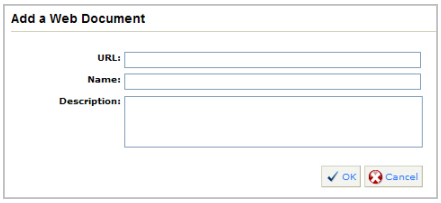
in the uPerform server workspace.

2. Click on the project name.

3. Click **Document Library**.

4. Navigate to the folder in which the web document will be stored.

5. Click **Add Web Document** on the left menu.



6. Complete the following information:

Field	Description
URL	Enter the web address of the document or link (for example, http://www.ancile.com).
Name	The default name is populated from the website. If desired, enter a name of the web document.
Description	The default description is populated from the website. If desired, enter amplifying information about the web document.

7. Click **OK**.

Editing Properties for a Managed or Web Document

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the folder in which the web or managed document is stored.
5. Click **Edit Properties** in the task pane.
6. Edit the name in the **Name** field.
7. Optionally, enter a description in the **Description** field.
8. Select a uPerform template from the **Template** listbox.

Selecting a template allows you to add a transaction code, and to associate uPerform template properties within the template to your web or managed document. For more information on template properties, refer to Specifying New Template Settings: Properties (on page 224).

Changing the Document Owner

The system administrator has permission to change the owner of a document individually or in bulk. The new owner of a document is automatically subscribed to the document.

The Bulk Change Owner option is only available at the project level.

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Perform one of the following options:

If You Want To	Then
Change the document owner for a single document	Click **Document Library**. Navigate to the folder containing the document to be edited. Click on the name of the binder containing the content. In the *Translations* section, click on the document to go to the cover page. Click **Change Owner** on the left menu. Click **uPerform Users** to locate and specify the new owner.
Change the document owner for all documents in a project	Click **Bulk Change Owner** on the left menu. Click **uPerform Users** to locate and specify the current owner. Click **uPerform Users** to locate and specify the new owner. Click **Next**.

4. Click **Save**.

Deleting Content

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the folder containing the document to be deleted.
5. Navigate to the uPerform binder or document cover page.

6. Click **Delete** on the left menu.

Deleting a document will move the document and its associated content, such as previous versions and discussions, to the recycle bin. For detailed information on managing the recycle bin, refer to Managing the Recycle Bin (on page 108).

7. Click **OK** at the confirmation prompt.

Editing the Hit Count and Assessment Results

To help determine how often a document is being used during a specific period of time you can reset the hit count. Hit count is determined per browser session when logged in as an end user or when accessing the server as an anonymous user. Hit count does not provide any information on the user who accessed the document.

Resetting the hit count must be performed on a per document basis. Hit counts are available for uPerform and managed documents. If you want to run a hit count report for all documents, refer to Create and Edit Custom Reports (on page 205).

Assessment results are available for Info Pak simulations and uPerform simulations and courses. For more information on tracking assessment results, refer to Using Reports (on page 197).

1. Click

in the uPerform server workspace.

2. Click on the project name.

3. Click **Document Library**.

4. Navigate to the folder containing the document to be edited.

5. Click on the name of the binder containing the content.

6. Perform one of the following options:

If You Want To	Then
Reset the hit count for the binder and all of its translated content	Click **Reset Hit Count** on the left menu. This functionality is available only for uPerform and managed documents.
Reset the hit count for a single document	In the Translations section, click on the document to go to the cover page. Click **Reset Hit Count** on the left menu. This functionality is available only for uPerform and managed documents.
Clear assessment results for a single document	Select **Clear Assessment Results** on the left menu. This functionality is available only for Info Pak simulations and uPerform simulations and courses.

7. Click **OK**.

Moving Folders and Content

Administrators have access to move folders and content within the document library and the website. You cannot move content between projects or between the document library and the website.

If you have moved content within the document library and want this content to display in a new location on the end user website, you must change the website context for the content. For detailed information on website context, refer to Assigning a Context to Content.

1. Click

in the uPerform server workspace.

2. Click on the project name.

3. Click **Document Library** or **Website**.

4. Navigate to the folder containing the content to be moved.

5. Click **Move** on the left menu.

6. Select the checkbox to the left of the folder or content name.

7. Click **OK**.

8. Navigate to the new location.

9. Click **Paste Here** on the left menu.

10. Select the checkbox to the left of the new location name.

11. Click **OK**.

Managing Translations and Related Content

In uPerform, translated content is linked to other content via a binder. A binder contains the original document and all subsequent translations. Translated content may be either uPerform content or managed documents. Translated uPerform content may be linked to other uPerform content via a Save As operation or by creating new content in another language.

For example, your US team may have content that must be slightly modified to reflect the business process in your UK office. You can save the US content to create translated UK content and then incorporate the process and language edits required. In addition, another author can create new French content and check this new document into the same binder as long as French content does not already exist. When the original US content is changed, both the author of the UK translated content and the French content will receive notification of the change and can then review the translated content to potentially incorporate changes. In addition, you can enable and disable a translation for display on the end user website.

When you check a translated document into the server, you are automatically subscribed to the translation. When changes are made to the original document from which the translation was made, you will receive a notification via email and a posting on your personal page.

Related content is uPerform content that is associated with other uPerform content within the same project on the server. Related content does not share properties with other content but rather allows you to identify content with similar characteristics for display on your end user website. For example, within the "Acme Corp" project, you can have a "Sales Team" folder that contains a document for filling out a timesheet. In that same project, you can have a "Sales Clerk" folder. Some of the codes in the "Sales Team" document could be relevant to the "Sales Clerk." You can relate this document from "Sales Team" folder to content in the "Sales Clerk" folder.

Working with Translated Content

Creating translated content allows you to customize content to reflect processes that differ between location or business units. To create translated files, you must enable locales on the server. For more information, refer to "Configuring Locale Settings" in the *ANCILE uPerform Administration* manual.

Checking in translated content stores the translated content in the *Translations* area of the binder containing the original uPerform content. In addition, uPerform allows you to use the uPerform client to check in a completely separate document in another language. The additional document must be of the same type and must be in another language than the original document.

Creating Translated Content

1. Using the uPerform client, perform one of the following:

If You Want To	Then
Enable a translation of the original document into a secondary language.	Open an existing uPerform document. Click **File>Save As...** on the original document. Go to Step 2.
Create a new document in a secondary language.	Refer to *Creating Content* in the *Creating Content with ANCILE uPerform* companion manual.

Content must be checked into the server.

2. Select **File > Save As...**.
3. Select the **New Translation** option.
4. Select a language from the drop-down list.
5. Click **Save**.
6. Enter a name in the **File name** field.

Avoid the use of special characters when naming your content.

7. Click **Save**.

Checking Translated Content Into the Server

1. Create or open the translated uPerform content using the uPerform client.
2. Select **FILE > CHECK IN [FILENAME]...**.

This will open the *Check In* window and automatically select the appropriate check in location for the translated file. It will also display all binders in the current project that do not have a translated document in the current client document's language. You may check the document into the pre-selected location or chose another binder.

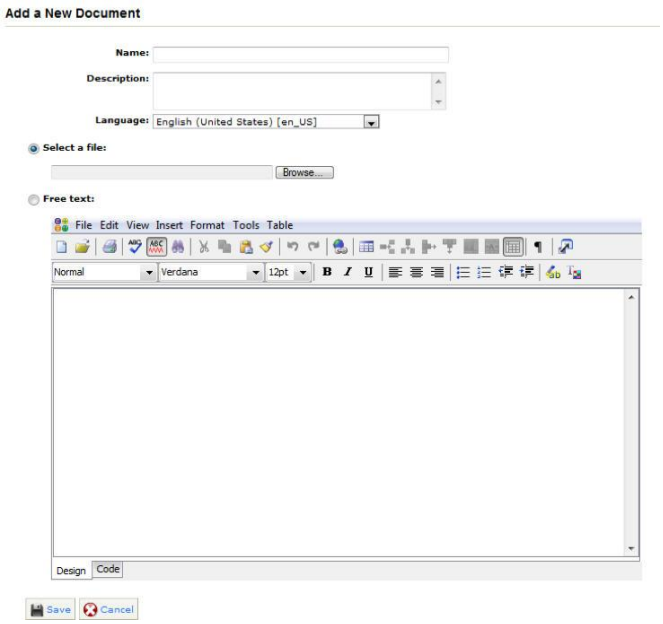
Choosing another binder is only an option with new content, not with **FILE>SAVE AS** content.

3. Click **OK**.

Adding Translated uPerform Managed Documents

The original managed document must already reside in your project.

1. Select the desired managed document binder.
2. Click **Add Translation**.



3. Complete the following fields:

Field	Description
Name	Enter the document name
Description	Enter amplifying information about the document.
Language	Select the desired language. The list contains all available languages that currently do not have translations.

4. Perform one of the following:

If You Want To	Then
Select a file (default)	Click **Browse...** to locate and select the managed document to upload. Click **Open**.
Free Text	Enter text and use the toolbar to format the text.

5. Click **Save** to add the translated managed document.

Viewing Translated Content

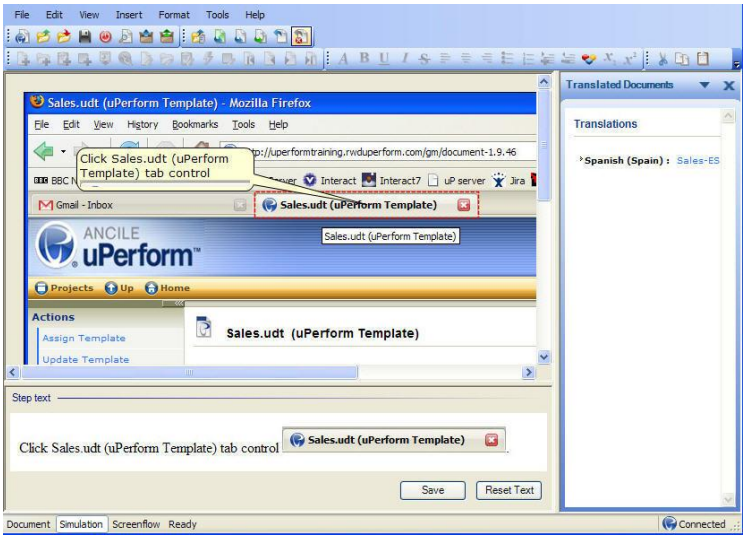
The parent content must be checked into the server first (or with the translated content via batch mode) in order to establish the content association. The server will display a link to the translated content in the *Translations* area in the binder.

From an end user's perspective, the uPerform server creates a language-based content filter for associated content. If the end user's language is set to French, the French associated content displays. If there is no associated content available in the end user's language, the content displays in the default language. The end user can also see all versions of content by clicking **Show All Help Documents** on the web page.

Viewing Translated Content From the Editor

1. From the uPerform editor, open the content which has associated content.
2. Select **VIEW > TASK PANE > TRANSLATED DOCUMENTS**.

The *Translated Documents* task pane opens to list all translated content for the displayed file.



Viewing Translated Content From the Server

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.

4. Navigate to the folder containing the file with translated content.
5. Click on the content name to go to the binder.
6. Scroll to the *Translations* area of the screen to view the translated documents.

7. Click on the translated document hyperlink to view detailed information about the document.

Setting the Default Translation

1. Navigate to the binder that contains the translation.
2. Click **Set Default Translation** in the left menu.

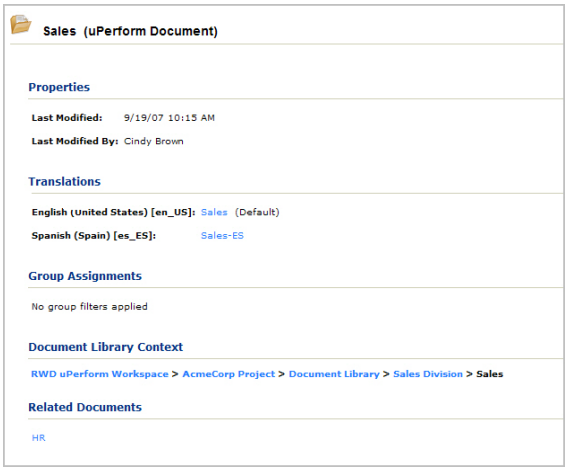
3. Select the default translation from the drop-down list.
4. Click **Save**.

Enabling and Disabling Translated Content

1. Click

in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the folder containing the file with translated content.

5. Click on the content name to go to the binder.



6. Under *Translations*, select the translation you want to enable or disable.

7. Perform one of the following:

If You Want To	Then
Enable a translation for display on the end user website	Click **Enable Translation** in the left menu.
Disable a translation for display on the end user website	Click **Disable Translation** in the left menu. You cannot disable the default translation.

8. Click **OK**.

Receiving Notifications About Documents

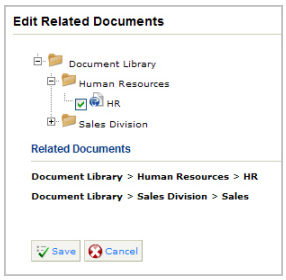
When you check a translated document into the server, you are automatically subscribed to the translation. When changes are made to the original document from which the translation was made, you will receive a notification via email and a posting on your personal page.

Working with Related Content

Related content is uPerform content that is associated with other uPerform content within the same project on the server. Related content is used in conjunction with group-based filtering. Related content does not share properties with other content but rather allows you to identify content with similar characteristics for display on your end user website. The act of relating content is performed from a binder.

Creating Related Content

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Select the folder containing the content for which you want to create a relationship.
5. Click on the content for which you want to create a relationship.
6. Click **Edit Related Documents** in the left menu.

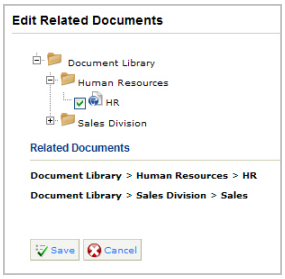


7. In the tree view, expand the folder that contains the content you want to relate.
8. Select the checkbox(es) next to the content you want to relate.
9. Click **Save**.

Modifying Related Content

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Select the folder containing the file for which you want to edit a relationship.
5. Click on the content for which you want to edit a relationship.

6. Click **Edit Related Documents** in the left navigation page.



7. In the tree view, expand the folder that contains the relationship you want to modify.

8. Select or deselect the checkbox(es) next to the content you want to add or remove from the relationship.

9. Click **Save**.

Removing Related Content

1. Click

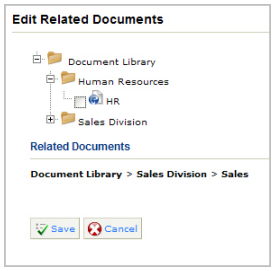
in the uPerform server workspace.

2. Click on the project name.

3. Click **Document Library**.

4. Select the folder containing the file for which you want to remove a relationship.

5. Click **Edit Related Documents** in the left navigation page.



6. In the tree view, expand the folder that contains the relationship you want to remove.

7. Deselect the checkbox(es) next to the relationship you want to remove.

8. Click **Save**.

Using Version History

A version history is maintained for uPerform content. The version history for uPerform content can be viewed from either the editor or server. The version history for a managed document can be viewed from the server only. All versions of a document are listed chronologically. For more information on using version history with the editor, refer to "Using Version History" in the companion manual *Creating Content with ANCILE uPerform.*

You can also revert, or rollback, to an earlier version of content from the server workspace. This action sets the latest version of a file to the previous version of the file.

Viewing the Version History from the Server

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Select the folder containing the content.
5. Click on the name of the binder containing the content you want to view.
6. Under *Translations* click on the name of the content.

   The current version designator is displayed to the right of **Version** in the *Document Properties* portion of the screen. A list of previous versions is displayed in the *Version History* portion of the screen.

7. To access an earlier version of a document, click on the content hyperlink below *Version History*.

Rolling Back to the Previous Version

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.

4. Select the folder containing the content.

5. Click on the name of the binder containing the content you want to view.

6. In the *Translations* section, click on the name of the content.

   A list of previous versions is displayed in the *Version History* portion of the screen.

7. Click **Rollback** on the left menu to set the current version of the document to the previous version.

   When you confirm the rollback, the current version of the document will be permanently deleted from the server. You cannot roll back a transformed Info Pak document (i.e. the resulting uPerform document). For more information on working with legacy Info Pak documents, refer to Incorporating Info Pak Content (on page 329).

8. Click **OK**.

Retention Period

uPerform allows system or project administrators to ensure the website content is current by setting project or system-level retention policies. Once you have published a document, the project retention policy will begin to track that document (including uPerform documents, managed documents, and Info Pak documents). The only documents not covered by retention periods are Student Guides, uPerform course packages, and web documents. Once the document has reached the implemented number of days, the uPerform server can perform one of the following:

- ❒ Remove published content from the web server.
- ❒ Send a notification to the author that the content is expired.

Administrators can change the periodicity and policies for each retention policy.

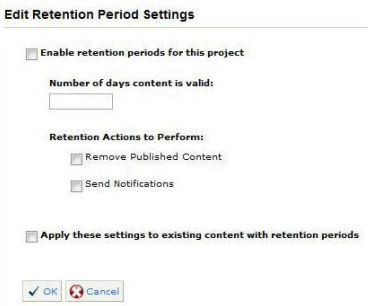
There are many reasons to implement a retention policy:

- ❒ Ensure accuracy of the project documentation
- ❒ Comply with legal requirements
- ❒ Meet business goals regarding return on investment

Adding a Retention Policy

1. Click

in the uPerform server workspace.
2. Click on the project name.
3. Click **Retention Period**.


Edit Retention Period Settings
Enable retention periods for this project
Number of days content is valid:
Retention Actions to Perform:
Remove Published Content
Send Notifications
Apply these settings to existing content with retention periods
OK
Cancel

4. Complete the following fields:

Field	Description
Enable retention periods for this project	Allows Administrator to implement a retention policy on the current project.
Number of days content is valid	Sets the number of days until the actions that follow are triggered.
Delete Published Content	Removes the expired, published content from the accessible website.
Send Notifications	Notifies the author and any subscribers to the document that the document has expired.
Apply these settings to existing content with retention periods	Updates project content with the updated retention policy.

5. Click **Save**.

uPerform server retention notifications are executed hourly. Notifications will be triggered on the next available retention process after the content has expired. That is, content that expires on 6 June, 2013 11:48AM will not have notifications sent until 12PM on 6 June 2013 rather than immediately.

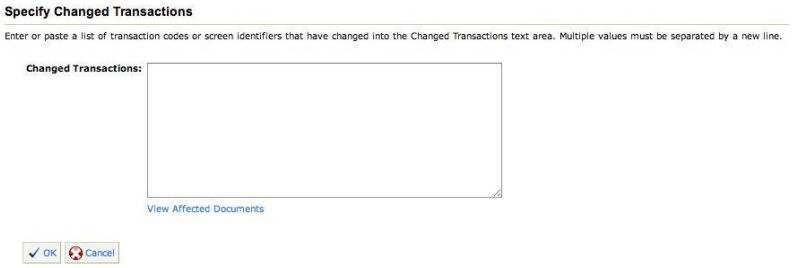
Transaction Change Notifications

uPerform allows system or project administrators to manually or automatically notify authors/subscribers of changes to your enterprise application. Administrators can enter a list of changed transaction codes, iView IDs, or screen IDs directly into the uPerform server interface. Anyone subscribed to documents with these properties will be notified of the change. In addition, administrators can create integration credentials that will allow ANCILE Help Launchpad to automatically update uPerform with a list of changed transactions. Once Help Launchpad and uPerform are set up, Help Launchpad will send a list of changed transactions based on a schedule set within Help Launchpad.

To configure Help Launchpad to provide transaction change notification using uPerform, refer to the *Help Launchpad for ANCILE uPerform* user manual.

Manually Entering Transaction Notifications

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Specify Changed Transactions**.


Specify Changed Transactions
Enter or paste a list of transaction codes or screen identifiers that have changed into the Changed Transactions text area. Multiple values must be separated by a new line.
Changed Transactions:
View Affected Documents
OK
Cancel

4. Enter changed transactions into the **Changed Transactions:** field. Each transaction must be on a separate line.
5. Select **View Affected Documents** to view the document names (not file names) that were impacted by the changed transactions.
6. Click **OK** to send notifications.

Creating Integration Credentials

1. Click **ADMINISTRATION > SERVER ADMINISTRATION > INTEGRATION SETTINGS > INTEGRATION CREDENTIALS** in the uPerform server workspace.

2. Click **Add Credential**.

3. Complete the following fields:

Field	Description
Credential ID	This is a unique user ID. This user ID cannot be synchronized nor can this ID be used to log into the system as a user.
Password	Must adhere to password strength requirements.
Password Confirmation	Must match password.

4. Click **Save**.

Editing Integration Credentials

1. Click **ADMINISTRATION > SERVER ADMINISTRATION > INTEGRATION SETTINGS > INTEGRATION CREDENTIALS** in the uPerform server workspace.

2. Select the credential to be changed.

3. Click **Edit Credential**.

4. Complete the following fields:

Field	Description
Credential ID	This is a unique user ID. This user ID cannot be synchronized nor can this ID be used to log into the system as a user.
Password	Must adhere to password strength requirements.
Password Confirmation	Must match password.

5. Click **Save**.

Deleting Integration Credentials

1. Click **ADMINISTRATION > SERVER ADMINISTRATION > INTEGRATION SETTINGS > INTEGRATION CREDENTIALS** in the uPerform server workspace.

2. Select the credential to be changed.

3. Click **Delete Credential**.

4. Click **OK**.

Managing the Recycle Bin

The uPerform recycle bin acts as a safety net from which to restore deleted content. When a user deletes content objects, discussions, folders, and subfolders, these items are moved to a recycle bin; they are not permanently deleted from the uPerform server.

There is one recycle bin for each uPerform project. A project administrator can empty the recycle bin for a project. The system administrator can restore or delete items for the entire server. When restored, the item is returned to its original location in the uPerform document library. The restore operation sets the owner of the object to the user who restored the item. When objects are deleted from the recycle bin, they are permanently removed from the server.

A deleted project is not sent to the recycle bin. A deleted project, including all of its documents, messages, and folders, cannot be restored.

Restoring an Item From the Recycle Bin

1. Log into the uPerform server via a web browser.
2. Click

.
3. Select the project from which the item was deleted.
4. Click **Recycle Bin** on the left menu.
5. Click on the hyperlink of the object to restore.
6. Click **OK** to restore the object.

Deleting an Item from the Recycle Bin

1. Log into the uPerform server via a web browser.
2. Click

.
3. Select the project from which the item was deleted.
4. Click **Recycle Bin** on the left menu.
5. Click **Empty Recycle Bin**.

6. Select the checkbox(es) nest to the item(s) you want to delete.

7. Click **OK**.

Chapter 6: Working With the Website

In addition to the document library view of content on the ANCILE uPerform server, there is also a website view of content. This view allows you to organize help content in a meaningful way for your end users.

Publishing is also an important part of working with the website. Publishing allows you to display final content on the website, as well as publish courses to a Learning Management System (LMS).

Introduction to the Website

The document library is structured in a logical fashion for your authors. For example, your document library might be organized by enterprise module. However, your end users might find it easier to locate content stored by function or role (for example, sales order processing or sales clerk). The website view in uPerform allows you to establish this user-friendly organization of content and addresses the question: "What's the best way for end users to locate on-the-job help?"

uPerform provides two methods for creating a website hierarchy:

- Building the website via context assignment - This method allows you to manually populate the website by assigning context to document library content. This method is well-suited for a small end user population and a small number of documents.

- Building the website via dynamic website folders - This method automatically populates your website using properties stored in the uPerform document. By planning your hierarchy, and assigning values to properties within your template, you can manage a multi-dimensional website that updates based on your published or republished content. If you plan to include web and managed documents in your dynamic website folders, you can assign templates using the instructions found in Editing Properties for a Managed or Web Document (on page 88). This method is well-suited for a larger end user community and a large number of documents.

If you are using optional group-based filtering, this option will affect the way content is displayed on the website. For more information on group-based filtering and working with groups, refer to Creating and Updating Groups (on page 55).

Within the website view, you will be linking to content in the document library. Content is not copied or moved to achieve display in the website.

Building the Website via Context Assignment

After creating a project and populating the document library view, you are ready to create the website structure. In most training rollouts, the website structure is often based on your planned curriculum design.

Building the website via context assignment allows you to manually organize your website by assigning context to document library content. A website folder built by context assignment is identified by a to the left of the folder name.

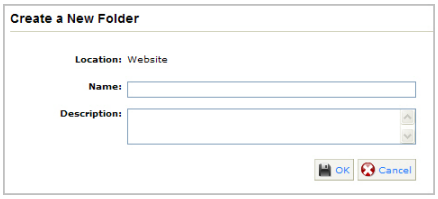
Optionally, you can populate your website via dynamic website folders. For more information, refer to Building the Website via Dynamic Website Folders (on page 119).

Using Website Folders for Context Assignment

Adding a Website Folder

1. Click

in the uPerform server workspace.
2. Click on the project name.
3. Click **Website**.
4. Click **Add Folder** on the left menu.



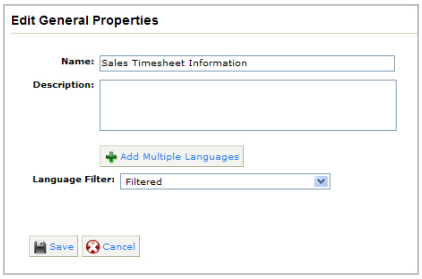
5. Complete the following information:

Field	Description
Name	Enter the name of the website folder.
Description	Enter amplifying information about the folder and its contents.

6. Click **OK**.
7. Repeat Step 4 through Step 6 to create additional folders and subfolders at the desired location(s).

Updating Website Folder Properties

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Website**.
4. Navigate to the desired folder.
5. Click **Edit Properties** on the left menu.



6. Edit the following information:

Field	Description
Name	Edit the website folder name. Go to Step 8.
Description	Edit the amplifying information about the folder and its contents. Go to Step 8.
Add Multiple Languages Enable multi-language support to set a name and description of the website folder for any of the supported languages. This language-specific name and description will display based on the language preference set in the end user's account.	Click **Add Multiple Languages**. Select a default language from the drop-down list. (This language will be displayed if the name or description in the end user's language is not available.) Click **Enable**. Go to Step 7.
Language Filter	Select **Filtered** to display the content in the end user's language. or Select a language from the drop-down list to display content only in the selected language. Go to Step 8.

7. As needed, enter a name and description for the languages listed.

   From this screen you can also disable multiple language support.

8. Click **Save**.

Deleting a Website Folder

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Website**.
4. Navigate to the desired folder.
5. Click **Delete Folder** on the left menu.

   Deleting a folder will send the folder to the recycle bin. The documents will remain in the document library folder. For detailed information on managing the recycle bin, refer to Managing the Recycle Bin (on page 108).

6. Click **OK** at the confirmation prompt.

Assigning a Website Context to Document Library Content

When you assign a website context to a folder or document within the document library, you are creating a link from the website to the folder or document. You are not copying or moving content into the website. The link informs the uPerform server of the proper published content to display on the website.

- Assigning a context to a document library folder: Allows you to assign a context at the folder level. All published content within that folder will be linked to the specified website folder(s), as well as the related content. When you assign a context at the document level, only that document and its related content (when published) will be linked to the specified website folder(s).

- Assign content to a website folder: Allows you to add documents and document library folders into a single website folder. Documents must be within the same project.

Both document library folders and content can be linked to more than one location within the website. Website context assignment is available to administrators and to authors who have been granted access by an administrator.

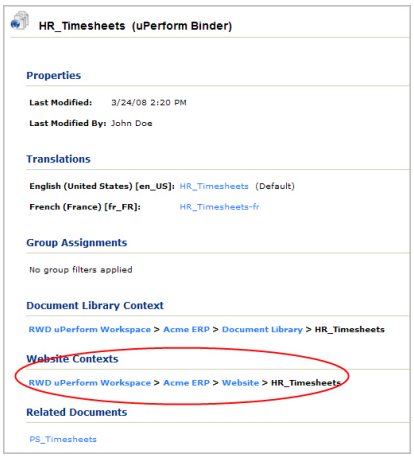
Assigning a Context to Content or a Document Library Folder

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the folder or document that you want to link to the website.
5. Click **Assign Website Context** on the left menu to display the first level of website folders you have created.

6. Perform one of the following options:

If You Want To	Then
Expand all items in the tree view	Click **Expand All**.
Collapse all items in the tree view	Click **Collapse All**.

7. Click + to the left of the folder name to navigate to the desired folder(s).
8. Click the checkbox to the left of one or more folders to create contexts in the website folder(s).
9. Click **Save**.


HR_Timesheets (uPerform Binder)
Properties
Last Modified: 3/24/08 2:20 PM
Last Modified By: John Doe
Translations
English (United States) [en_US]: HR_Timesheets (Default)
French (France) [fr_FR]: HR_Timesheets-fr
Group Assignments
No group filters applied
Document Library Context
RWD uPerform Workspace > Acme ERP > Document Library > HR_Timesheets
Website Contexts
RWD uPerform Workspace > Acme ERP > Website > HR_Timesheets
Related Documents
PS_Timesheets

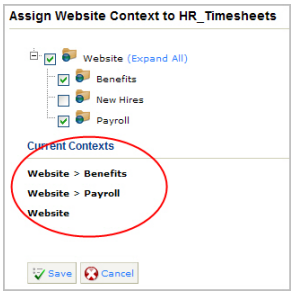
10. Repeat Step 4 through Step 9 to create additional context links from documents and document library folders to website folders.

Viewing Website Context

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the folder or document for which you would like to view the context.

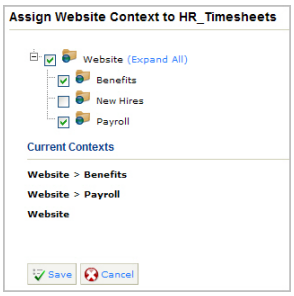
   This will open the binder for uPerform and Info Pak documents.

5. Click **Assign Website Context** on the left menu to display the website context.



Removing a Context from Content or a Document Library Folder

1. Click Projects in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the document or folder from which the context should be removed, and click on the document or folder name.
5. Click **Assign Website Context** on the left menu to display the first level of website folders you have created.
6. Click + to the left of the folder name to navigate to the desired folder(s).



7. Deselect the checkbox to the left of one or more folders to remove contexts in the website folder(s).

8. Click **Save**.

9. Repeat Step 4 through Step 8 to remove additional context links from documents or folders in the document library.

Assigning Content to a Website Folder

1. Click Projects in the uPerform server workspace.

2. Click on the project name.

3. Click **Website**.

4. Navigate to the website folder for which you want to assign content.

5. Click **Assign Content**.

6. Perform one of the following options:

If You Want To	Then
Expand all items in the tree view	Click **Expand All**.
Collapse all items in the tree view	Click **Collapse All**.

7. Click + to the left of the folder name to navigate to the desired content.

8. Perform one of the following options:

If You Want To	Then
Add one or more documents	Select the checkbox to the left of one or more documents.
Add one or more folders	Select the checkbox next to one or more folders.

9. Click **Save**.

Building the Website via Dynamic Website Folders

The dynamic website folder functionality automatically populates your website using template properties stored within the content. By planning your hierarchy, and assigning values to stored properties within your template, you can automatically build and manage a multi-dimensional website. For more information on properties, refer to Specifying New Template Settings: Properties (on page 224).

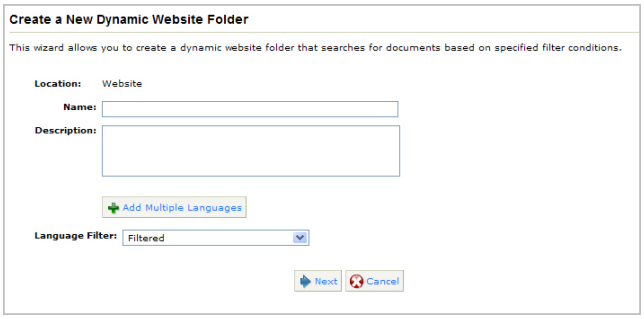
Dynamic website folders are updated when you add or remove documents and then republish. Document types include uPerform documents, as well as managed and web documents. You can also alter the properties specified within a dynamic website folder to add or remove content from the folder.

A dynamic website folder is identified by a to the left of the folder name in the author view. Optionally, you can populate your website via context assignment. For more information, refer to Building the Website via Context Assignment (on page 113).

Working with Dynamic Website Folders

Creating a Dynamic Website Folder

1. Click in the uPerform server workspace.
2. Click on the project name.
3. Click **Website**.
4. Navigate to the destination folder for the dynamic website folder.
5. Click **Add Dynamic Website Folder**.



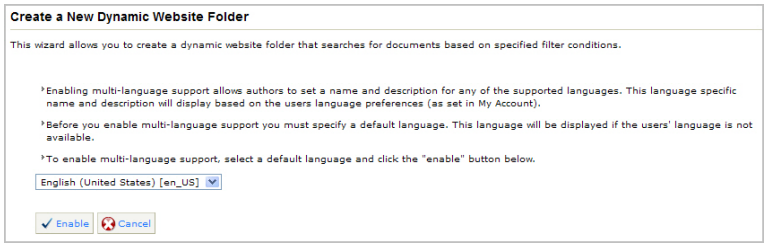
6. Complete the following fields:

Field	Description
Name	Enter a name for the dynamic website folder.
Description	Enter amplifying information about the folder.

7. Perform one of the following options:

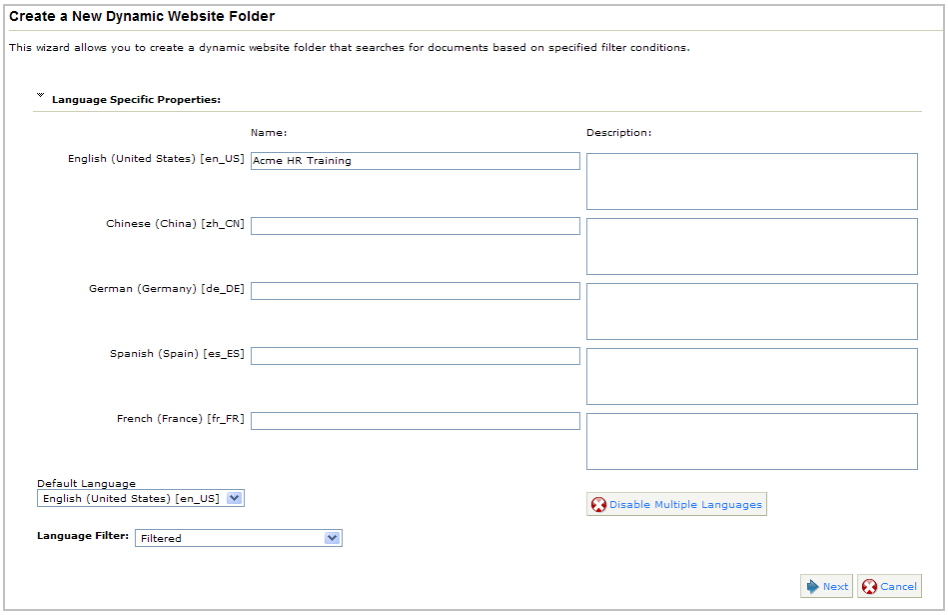
If You Want To	Then
Add multiple languages	Go to Step 8.
Create the dynamic website folder with one language enabled	Go to Step 12.

8. Click **Add Multiple Languages**.


Create a New Dynamic Website Folder
This wizard allows you to create a dynamic website folder that searches for documents based on specified filter conditions.
Enabling multi-language support allows authors to set a name and description for any of the supported languages. This language specific name and description will display based on the users language preferences (as set in My Account).
Before you enable multi-language support you must specify a default language. This language will be displayed if the users' language is not available.
To enable multi-language support, select a default language and click the "enable" button below.
English (United States) [en_US]
Enable
Cancel

9. Select a default language from the drop-down list.

10. Click **Enable**.



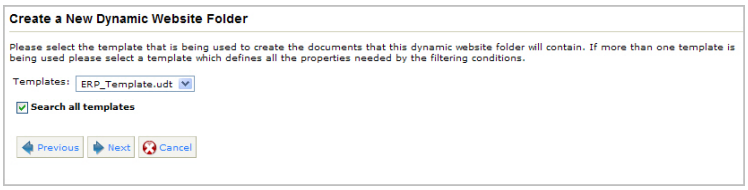
11. Complete the following fields:

Languages are generated based on the locales specified by the system administrator.

Field	Description
Name	Enter a name for the folder.
Description	Enter amplifying information about the folder.
Default Language	Optionally, change the default language for the folder.

12. Select a language filter from the drop-down list.

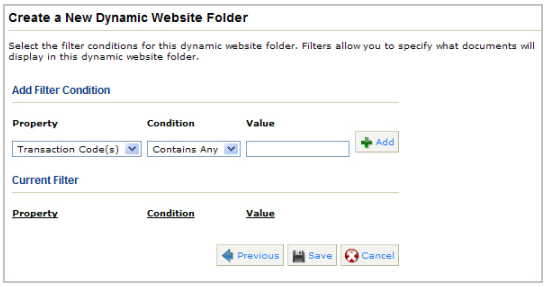
13. Click **Next**.


Create a New Dynamic Website Folder
Please select the template that is being used to create the documents that this dynamic website folder will contain. If more than one template is being used please select a template which defines all the properties needed by the filtering conditions.
Templates:
ERP_Template.udt
Search all templates
Previous
Next
Cancel

14. Select the template containing the properties from which you want to create your dynamic website folder.

15. Optionally, select **Search all templates** to expand the dynamic website folder to other templates with matching properties.

16. Click **Next**.



17. Select a template property from the **Property** drop-down list.

18. Select a condition from the **Condition** drop-down list:

Field	Description
=	Contains the exact values to be specified in Step 19. For example: **Transaction Code = ME25** will return all documents with the Transaction Code property set to ME25.
Contains Any	Contains any of the values to be specified in Step 19, which allows you to provide a comma delimited list of values within the Value field. For example: **Transaction Code Contains Any ME25, VA01** will return all documents with the Transaction Code property set to ME25 OR VA01.
IS	Contains the exact value specified in Step 18.

19. Enter a value(s) in the **Value** field.

20. Click **Add**.

21. Repeat Steps 17 through 20 to add additional properties and filtering conditions to the dynamic website folder.

22. Click **Save**.

Editing a Dynamic Website Folder

1. Click

in the uPerform server workspace.

2. Click on the project name.

3. Click **Website**.

4. Select the dynamic website folder.

5. Select **Edit Properties**.

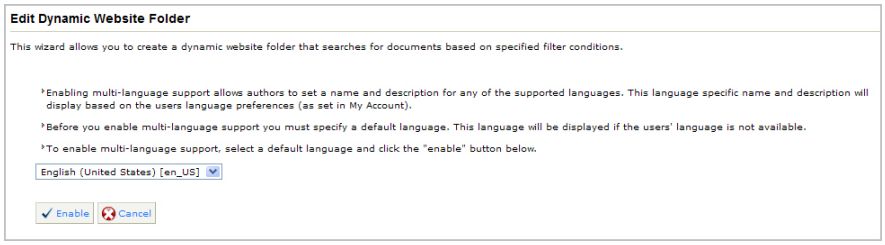
6. Complete/review the following fields:

Field	Description
Name	Enter a name for the dynamic website folder.
Description	Enter amplifying information about the folder.

7. Optionally, edit the language filter.

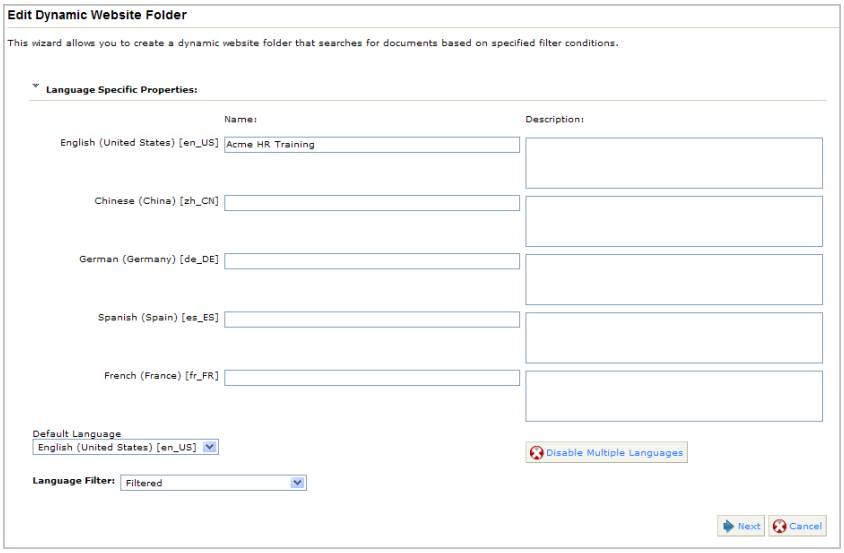
8. Perform one of the following options:

If You Want To	Then
Add multiple languages	Click **Add Multiple Languages**, and go to Step 9.
Disable multiple languages	Click **Disable Multiple Languages**, and go to Step 12.


Edit Dynamic Website Folder
This wizard allows you to create a dynamic website folder that searches for documents based on specified filter conditions.
Enabling multi-language support allows authors to set a name and description for any of the supported languages. This language specific name and description will display based on the users language preferences (as set in My Account).
Before you enable multi-language support you must specify a default language. This language will be displayed if the users' language is not available.
To enable multi-language support, select a default language and click the "enable" button below.
English (United States) [en_US]
Enable
Cancel

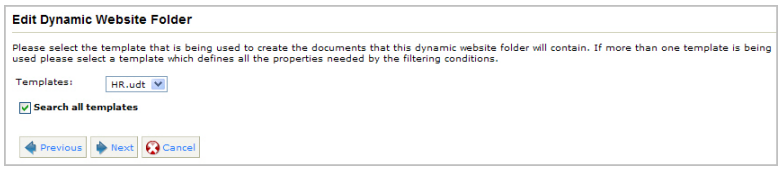
9. Select a default language from the list.

10. Click **Enable**.



11. Go to Step 13.

12. Click **Next**.

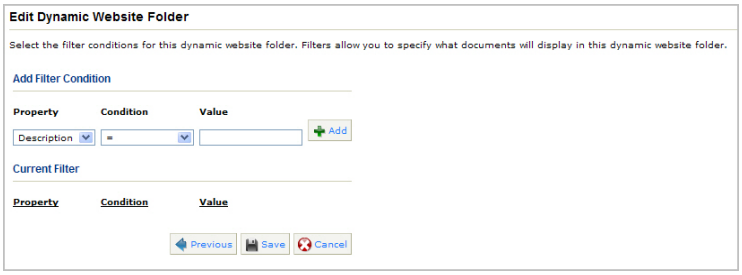

Edit Dynamic Website Folder
Please select the template that is being used to create the documents that this dynamic website folder will contain. If more than one template is being used please select a template which defines all the properties needed by the filtering conditions.
Templates:
HR.udt
Search all templates
Previous
Next
Cancel

13. Select the template containing the properties from which you want to create your dynamic website folder.

Changing the template will remove all filter criteria from the folder.

14. Optionally, select **Search all templates** to expand the dynamic website folder to other templates with matching properties.

15. Click **Next**.



16. Select a template property from the **Property** drop-down list.

17. Select a condition from the **Condition** drop-down list:

Field	Description
Contains Any	Contains the exact values to be specified in Step 17, and will return all documents with the Transaction Code property. For example: **Transaction Code = ME25** will return all documents with the Transaction Code property set to ME25.
=	Contains any of the values to be specified in Step 17, which allows you to provide a comma delimited list of values within the Value field. For example: **Transaction Code Contains Any ME25, VA01** will return all documents with the Transaction Code property set to ME25 OR VA01.
IS	Contains the exact value specified in Step 19.

18. Enter a value(s) in the **Value** field.

19. Click **Add**.

20. Repeat Steps 15 through 18 to edit additional filtering conditions in the dynamic website folder.

21. Click **Save**.

Deleting a Dynamic Website Folder

1. Click in the uPerform server workspace.
2. Click on the project name.
3. Click **Website**.
4. Select the Dynamic Website Folder.
5. Click **Delete Folder**.
6. Click **OK**.

Deleting the dynamic website folder will move the folder and subfolders to the recycle bin.

Browsing the Website

Via standard hyperlink navigation, you can browse the website and view the hierarchy and published content objects.

Navigating via the Website Context

Content objects include a *Website Context* area on the cover page. This area provides a hierarchical display of the object's location in the website. You can click on a hyperlink in the displayed hierarchy to navigate to another location in the website.

Publishing Content for Display on the Website

In addition to local publishing, uPerform provides a mechanism to publish uPerform content, managed documents, and web documents directly from the server. The publish queue on the server can be configured to automatically publish at off-peak hours. In addition, uPerform content will publish to the website even if the template is not assigned to the project in which the content resides.

Note that all content must be assigned a website context (either at the document level or the folder level) before published server content will display on the website.

Publishing Configuration

You must be a part of the uPerform Publishing Administrators role to configure publishing settings and manage the publish queue. For detailed information on uPerform roles, refer to Managing Users, Roles, and Groups (on page 29).

ANCILE uPerform content types available for publishing are controlled by the template used to create the content. uPerform content formats available for publishing are controlled by the server. If the template for the document has been updated, you can republish all documents associated with the template.

Output formats for managed documents (in Microsoft Word, PowerPoint, and Excel formats) are dictated by the conversion types enabled. Managed documents in other formats (for example, .pdf and .zip files) are not technically published to an alternate format or type. However, you must add these managed documents to the publish queue in order to have the managed document display on the website. This final step in the development process allows you to maintain access control to your managed documents.

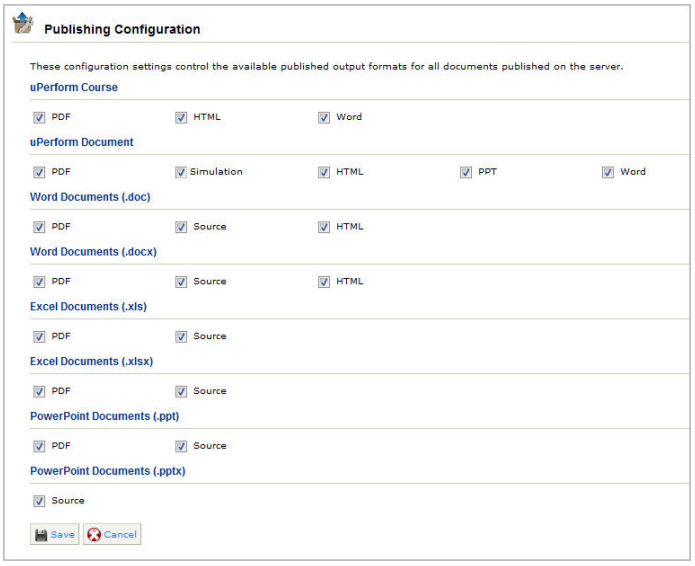
Web documents are not technically published to an alternate format or type. However, you must add the web document to the publish queue in order to have the web document display on the website. This final step in the development process allows you to maintain access control to your web documents. Web documents are immediately displayed on the website after being added to the publish queue.

Enabling Conversion Types for uPerform and Managed Documents

1. Click **Administration** on the left menu of the server workspace.

2. Click **Server Administration** in the *Administration* area.

3. Click **Publishing** in the *Server Administration* area.



4. Select one or more of the following conversion types to enable:

You must have at least one conversion type selected in order to publish content.

Field	Description
Enable a uPerform course to convert to PDF, HTML, or Word	Select the checkbox(es) in the *uPerform Course* area to enable conversion to PDF, HTML, or Word.
Enable a uPerform document to convert to PDF, Simulation, HTML, PowerPoint, or Word.	Select the checkbox(es) in the *uPerform Document* area to enable conversion to PDF, Simulation, HTML, PowerPoint, or Word.
Enable Word (.doc) to convert to PDF, Source, or HTML	Select the checkbox(es) in the *Word (.doc)* area to enable conversion to PDF, Source, or HTML.
Enable Word (.docx) to convert to PDF, Source, or HTML	Select the checkbox(es) in the *Word (.docx)* area to enable conversion to PDF, Source, or HTML.
Enable Excel (.xls) to convert to PDF or Source	Select the checkbox(es) in the *Excel (.xls)* area to enable conversion to PDF or Source.
Enable Excel (.xlsx) to convert to PDF or Source	Select the checkbox(es) in the *Excel (.xlsx)* area to enable conversion to PDF or Source.
Enable PowerPoint (.ppt) to convert to PDF or Source	Select the checkbox(es) in the *PowerPoint (.ppt)* area to enable conversion to PDF or Source.
Enable PowerPoint (.pptx) to convert to Source	Select the checkbox in the *PowerPoint (.pptx)* area to enable conversion to Source.

5. Click **Save**.

Publishing Content from the Server

The uPerform server can be configured to automatically publish content in the publish queue daily at off-peak hours. Content is automatically placed in the queue when 1) you add content to the publish queue, 2) the content has completed workflow and the workflow includes the option to automatically publish content when the workflow is completed, or 3) the content is updated from the Glossary when the option is enabled.

For detailed information on creating a regular publishing task, refer to the *ANCILE uPerform Administration* user manual.

For detailed information on using workflow functionality, refer to Using Workflow (on page 143).

Via the publish queue, you can also immediately process one or more documents. For complete details on the publish queue, refer to Viewing the Publish Queue and History (on page 130).

Adding a Document or Folder to the Publish Queue

The following procedure applies to uPerform, managed, and web documents and can be performed by the publishing administrator.

1. Click

in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Perform one of the following:

If You Want To	Then
Add a folder to the publish queue	Navigate to the folder that you want to publish.
Add a document to the publish queue	Navigate to the folder in which the document is located. Click on the document to be added to the queue.

5. Click **Add to Publish Queue** on the left menu.
6. Click **OK** at the confirmation prompt.

If you update a definition in the Glossary, content associated with the definition that has been previously approved via workflow and published will be automatically sent back to the publishing queue. This allows you to republish the content with the updated definition.

Viewing the Publish Queue and History

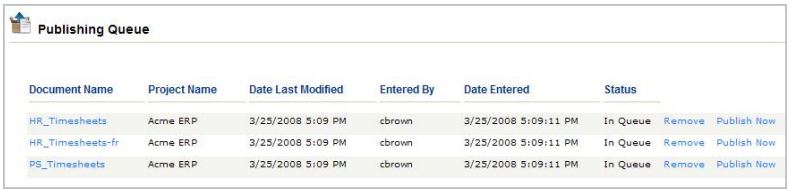
The publish queue displays the publish events scheduled to start. Both uPerform and managed documents are displayed in the publish queue.

The publish history list displays a record of publishing events from the last 30 days.

After 30 days, history records are removed on a first-in/first-out basis. History records are not archived.

Viewing the Publish Queue

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Publishing** in the *Server Administration* area.
4. Click **View Publishing Queue** on the left menu.



5. Review the following information:

Field	Description
Document Name	The name of the document included in the publish processing.
Project Name	The name of the project containing the document.
Date Last Modified	The date and time the document was last modified.
Entered By	The ID of the user who last added the document.
Date Entered	The date and time the document was added to the queue.
Status	The current status of the publishing process for the document.

6. As necessary, click **Previous** or **Next** to navigate through the queue.
7. Optionally, click **Remove** to remove a document from the publish queue, or click **Publish Now** to immediately publish the document.

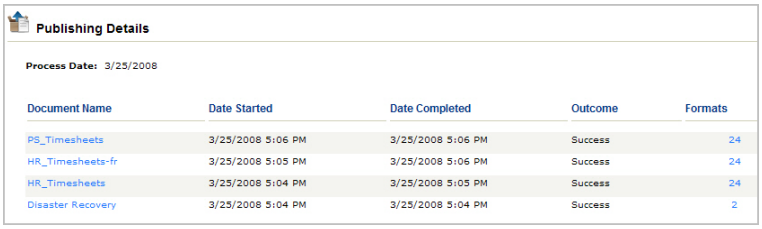
8. Perform one or more of the following actions:

If You Want To	Then
Empty the publish queue	Click **Delete All**.
Immediately process the publish queue	Click **Publish All**. You will need to refresh the web browser window if you want to verify that publishing is complete.
Refresh the publish queue	Click **Refresh Queue**.

Viewing the Publish History

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Publishing** in the *Server Administration* area.
4. Click **View History** on the left menu.

5. Click on the hyperlink in the **Documents Processed** column to the right of the history date to be reviewed.


Publishing Details
Process Date: 3/25/2008
Document Name
Date Started
Date Completed
Outcome
Formats
PS_Timesheets 3/25/2008 5:06 PM 3/25/2008 5:06 PM Success 24
HR_Timesheets-fr 3/25/2008 5:05 PM 3/25/2008 5:06 PM Success 24
HR_Timesheets 3/25/2008 5:04 PM 3/25/2008 5:05 PM Success 24
Disaster Recovery 3/25/2008 5:04 PM 3/25/2008 5:04 PM Success 2

6. Review the following information:

Field	Description
Document Name	The name of the document included in the publish processing.
Date Started	Lists the date and time the publish process was started.
Date Completed	Lists the date and time the publish process was completed.

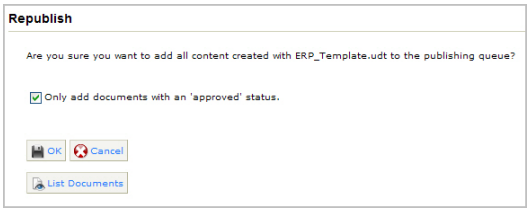
Field	Description
Outcome	Lists the success or failure status of the publishing process.
Formats	Lists the number of formats processed during the publish activity. You can click on this hyperlinked number to review the format details.

7. As necessary, click **Previous** or **Next** to navigate through the history list.
8. Optionally, click **Refresh Queue** to refresh the list.
9. Optionally, click **View Different Date** to view documents published on other dates.

Republishing Documents

Use this procedure to republish updated uPerform, managed, and web documents, associated with an updated template. It is not necessary to republish documents that are up-to-date.

1. Click **Administration** on the left menu.
2. Click **Server Administration** in the Administration area.
3. Click **uPerform Templates** in the *Server Administration* area.
4. Select a template from the list.
5. Click **Republish** on the left menu.


Republish
Are you sure you want to add all content created with ERP_Template.udt to the publishing queue?
Only add documents with an 'approved' status.
OK
Cancel
List Documents

6. Perform one or more of the following options:

If You Want To	Then
Republish all documents associated with the updated template regardless of approval status	Deselect **Only add documents with an 'approved'** status. An approved document is the most recent version that has been sent to the publishing queue by the project administrator and has approved workflow status.
View a list of documents associated with the updated template	Click **List Documents**. Only documents which require updating will be listed.

7. Click **OK**.

Documents will be added to the publishing queue. For more information, refer to Publishing Content for Display on the Website (on page 127).

Subscribing to Publish Events

You can subscribe to be notified when the publish activity is complete. Subscription notices can be delivered via your uPerform personal page, email message, or via both methods.

Subscribing to a Publish Event

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Publishing** in the *Server Administration* area.
4. Click **Subscribe** on the left menu.
5. Select one or more of the following options:

Option	Description
Post notifications to my Personal Page.	Select this option to receive your subscription notification in the **My Alerts** section of your uPerform personal page.
Send notifications in an email report to [your email address].	Select this option to receive your subscription notification via email message. Specify one of the following email notification types: daily, weekly, or immediately after an event. If you select the **Immediate** radio button, specify a notification type.

6. Click **OK**.

Publishing Courses to an LMS

Courses with assessment sections can be tracked using a Learning Management System (LMS). When you publish to an LMS, uPerform leverages the Package Exchange Notification Services (PENS) standard to support the transfer of published content to the LMS.

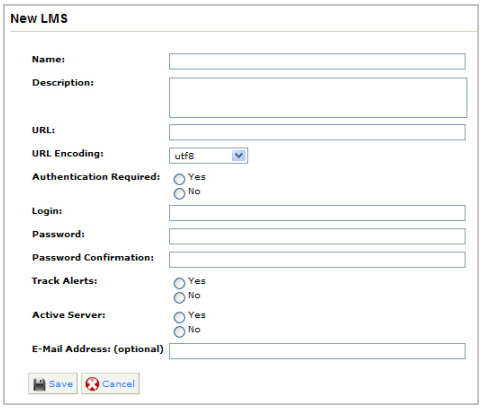
Tracking functionality includes the collection, receipt, and update notifications which display in the *LMS Transactions* area on the content cover page.

You must be a system administrator, project administrator, or publishing administrator to add, enable, or disable an LMS instance within the uPerform server.

Adding a New LMS

If you plan to publish courses to the ANCILE uLearn LMS, ensure that anonymous access is enabled for the project. For more information, refer to Specifying Project Settings (on page 72).

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **LMS Settings** in the Server *Administration* area.
4. Click **New LMS** on the left menu.



5. Complete the following fields:

Field	Description
Name	Enter a name for the LMS.
Description	Enter a description for the LMS.

Field	Description
Name	Enter a name for the LMS.
URL	Enter the website address of the LMS (For example: http://acme.uLearn.com).
URL Encoding	Select the URL encoding format from the dropdown list.
Authentication Required	Click the checkbox if you want to require authentication.
Login	If authentication is required, enter the login name associated with the LMS.
Password	If authentication is required, enter the password associated with the LMS.
Password Confirmation	Confirm the password.
Track Alerts	Select **Yes** if you want to track alerts for collect, receipt, and update messages to the uPerform server.
Active Server	Select **Yes** to enable communication with the LMS. Select **No** to disable communication with the LMS.
E-Mail Address	Enter the email address where you can receive alert notifications.

6. Click **Save**.

Modifying LMS Properties

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **LMS Settings** in the *System Administration* area.
4. Click on the name of the LMS you want to modify.
5. Click **Edit Properties** on the left menu.
6. As required, edit the following fields:

Field	Description
Name	Enter a name for the LMS.
Description	Enter a description for the LMS.
URL	Enter the website address of the LMS (For example: http://acme.uLearn.com).
URL Encoding	Select the URL encoding format from the drop-down list.

Field	Description
Authentication Required	Click the checkbox if you want to require authentication.
Login	If authentication is required, enter the login name associated with the LMS.
Password	If authentication is required, enter the password associated with the LMS.
Password Confirmation	Confirm the password.
Track Alerts	Select **Yes** if you want to track alerts for collect, receipt, and update messages to the uPerform server.
Active Server	Select **Yes** to enable communication with the LMS. Select **No** to disable communication with the LMS.
E-Mail Address	Enter the email address where you can receive alert notifications.

7. Click **Save**.

Assigning Projects to an LMS

Publishing any course from a project to which an LMS is assigned will result in PENS notifications being sent to all LMSs associated with that project.

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **LMS Settings** in the *System Administration* area.
4. Click on the name of the LMS to be assigned to a project.
5. Click **Assigned Projects** in the left menu.

6. Click the checkbox next to the name of the project(s) to be assigned to the LMS.
7. Click **Save**.

Unassigning Projects from an LMS

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **LMS Settings** in the *System Administration* area.
4. Click on the name of the LMS to be assigned to a project.
5. Click **Assigned Projects** on the left menu.

6. Deselect the checkbox next to the name of the project(s) to unassign from the LMS.
7. Click **Save**.

Enabling or Disabling an LMS

Enabling an LMS starts communication between the LMS and the uPerform server. Disabling an LMS stops communication between the LMS and the uPerform server. Disabling does not remove content already transmitted to the LMS. Communication history is still available in the *LMS Transactions* area of the project cover page.

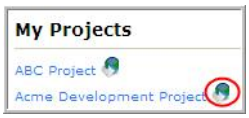
1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **LMS Settings** in the *System Administration* area.
4. Click on the name of the LMS you want to enable or disable.
5. Click **Edit Properties** on the left menu.
6. Choose one of the following options:

If You Want To	Then
To enable an LMS	Select the **Yes** radio button associated with Active Server.
To disable an LMS	Select the **No** radio button associated with Active Server.

7. Click **Save**.

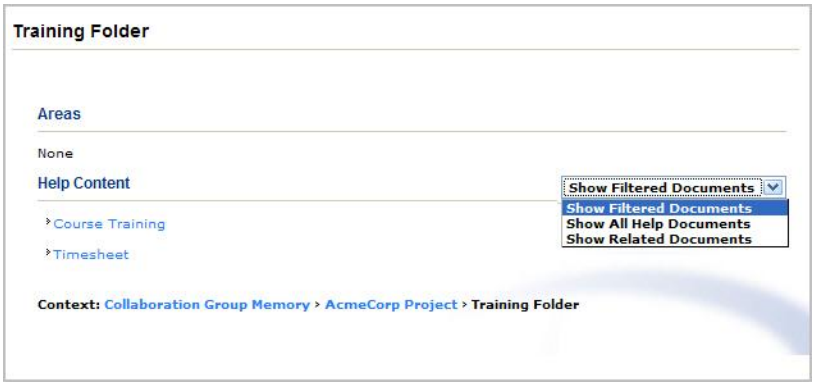
Viewing the End User Website

From your **My Projects** list on your personal page you can access both the document library and the end user website views of the project. To display the end user website view of your project, click to the right of the project name in the **My Projects** list and navigate to the desired website folder.

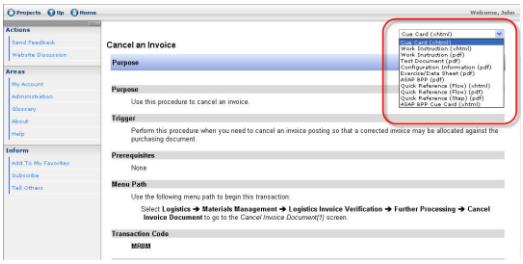


You can also view the end user website via the **View as End User** link on the left menu, which is available from website folders, documents, and projects.

When the website is displayed, end users who are logged in can toggle between viewing all help content (Show All Help Documents), viewing just the help content applicable to the specified language (Show Filtered Documents), or viewing content that has been related to the content displayed (Show Related Documents). In addition, an anonymous end user can select a language that they want the uPerform server to display.



When the end user clicks on a help link, all available output formats are displayed.



Configuring and Customizing the Website

Refer to the *ANCILE uPerform Administration* user manual for information on website customizations.

Chapter 7: Using Workflow

Workflow functionality in ANCILE uPerform allows you to automate the process of routing content to reviewers. Using uPerform, you can create and initiate workflow, and allow reviewers to approve or reject content.

Introduction to Workflow

To facilitate review of content, uPerform allows you to create and initiate workflow processes. During the workflow process, the content is circulated among a list of uPerform users who can approve or reject the content.

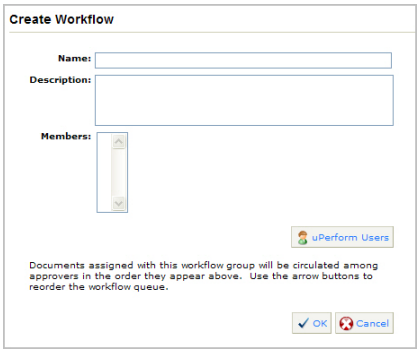
Creating and Starting a Workflow

In order to start a workflow on a document, the document must be checked into the server.

- Administrators can create predefined workflow groups from the server workspace. These workflow groups are available to all projects on the uPerform server.
- Authors can create and start ad-hoc workflows if granted permission from the project administrator. For more information, refer to Specifying Project Settings (on page 72).

Creating a Workflow

1. Click **Workflow** on the left menu to display a list of existing workflow groups.
2. Click **New Workflow**.


Create Workflow
Name:
Description:
Members:
uPerform Users
Documents assigned with this workflow group will be circulated among approvers in the order they appear above. Use the arrow buttons to reorder the workflow queue.
OK
Cancel

3. Enter the following information:

Field	Description
Name	Enter the name of the workflow group.
Description	Enter optional amplifying information about the workflow.
Members	Click **uPerform Users** to add users to the workflow group.

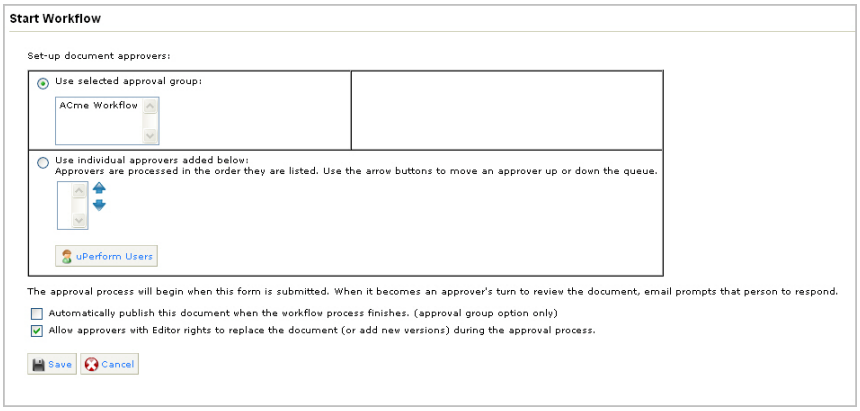
4. After selecting the users, use the up and down arrows to the right of the **Members** list to set the sequence of reviewers in the approval process.
5. Click **OK**.

Starting a Workflow

1. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

2. Click **Start Workflow** on the left menu.


Start Workflow
Set-up document approvers:
Use selected approval group:
ACme Workflow
Use individual approvers added below:
Approvers are processed in the order they are listed. Use the arrow buttons to move an approver up or down the queue.
uPerform Users
The approval process will begin when this form is submitted. When it becomes an approver's turn to review the document, email prompts that person to respond.
Automatically publish this document when the workflow process finishes. (approval group option only)
Allow approvers with Editor rights to replace the document (or add new versions) during the approval process.
Save
Cancel

3. Select one of the following options to specify approvers:

Option	Description
Use selected approval group	To use a predefined workflow, select the name.
Use individual approvers added below	To create an ad hoc list of reviewers, click **uPerform Users** and select the users. Use the up and down arrows to set the sequence of reviewers in the approval process. This option always displays for an administrator. This option displays for an author only if the project administrator has enabled ad-hoc workflow functionality on the project.

4. To publish the document when the predefined or ad-hoc workflow process is complete, select the **Automatically publish this document when the workflow process finishes. (approval group option only)** checkbox.

5. To enable versioning in workflow, select the **Allow approvers with Editor rights to replace the document (or add new versions) during the approval process** checkbox.

6. Click **Save**.

7. Click **OK** on the confirmation page.

Using Workflow Notifications

The uPerform workflow functionality includes email notifications to inform reviewers of workflow tasks and to inform authors when the workflow has been completed. These notifications occur automatically; no setup is required to enable workflow notifications.

Workflow notifications are sent via email.

A reviewer's **My Review List** displays documents in workflow that are assigned to the reviewer. For more information, refer to Using the My Review List (on page 25).

Viewing a Reviewer Notification

As the workflow progresses through the list of reviewers, each reviewer will receive an email notifying him of a document awaiting review.

The notification email subject line reads "You are needed to review the document "[Document Name]". The email includes a hyperlink to the document.

Viewing an Author Notification

When the workflow for a document is complete, the workflow creator will receive an email notification of workflow completion. The email includes a hyperlink to the document.

Updating a Workflow

You can update a workflow and its members. Documents that are already in workflow will not be affected by an update.

Updating a Workflow

1. Click **Workflow** on the left menu to display a list of existing workflows.
2. Click on the name of the workflow to be updated.
3. As desired, edit the name or description of the workflow.
4. As desired, reorder the list of reviewers using the up and down arrows.
5. To add or remove reviewers, click **uPerform Users**.
6. Click **Save**.

Participating in a Workflow

When a workflow process begins for a document, the first user in the workflow queue receives an email message indicating the document is awaiting review. The email also contains a link to the document within the uPerform system.

Using the My Review List

Your **My Review List** displays content currently in a workflow assigned to you. The five most recent documents are displayed. To display all documents, click **More...**.

To view a workflow item in your review list:

1. Click Home.
2. Click on the document name in the **My Review List**.
3. From the document cover page, you can review the latest version of the document to approve or reject the document.

Making Comments or Changes During a Workflow

Reviewers are allowed to make changes to content during workflow if the author or administrator who started the workflow has allowed approvers with editor rights access to edit the document.

Approving a Document During Workflow

1. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

2. Click **I Approve** in the *Workflow* area of the window.
3. Click **OK**.

   When a document is approved by the final reviewer, the workflow creator receives email notification of workflow completion.

Rejecting a Document During Workflow

1. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

2. Click **I do not Approve** in the *Workflow* area of the window.

3. Complete the following information:

Field	Description
To	Enter any email address(es) in addition to previous approvers and authors, or click **Collaboration Users** to select users from a list.
Subject	Edit the default subject text, as necessary.
Message	As desired, add information to the default message text.

4. Click **OK**.

   When a document is rejected, all users in the notification **To** field receive an email informing them of the rejection.

Stopping a Workflow and Deleting a Workflow

Authors and administrators can stop a workflow. Reviewers who have completed their review are notified via email. Restarting the workflow begins with the first reviewer.

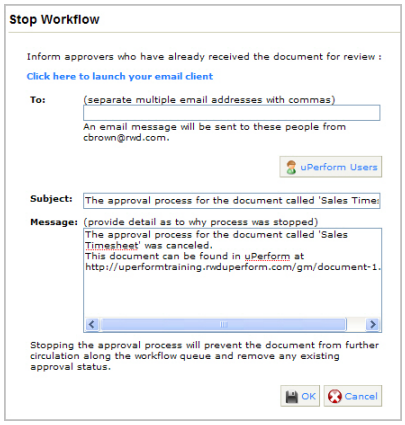
Deleting a workflow is not the same as stopping a workflow. Deleted workflows cannot be recovered.

Stopping a Workflow

1. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

2. Click **Stop Workflow** on the left menu.


Stop Workflow
Inform approvers who have already received the document for review :
Click here to launch your email client
To:
(separate multiple email addresses with commas)
An email message will be sent to these people from cbrown@rwd.com.
uPerform Users
Subject:
The approval process for the document called 'Sales Time
Message:
(provide detail as to why process was stopped)
The approval process for the document called 'Sales Timesheet' was canceled.
This document can be found in uPerform at http://uperformtraining.rwduperform.com/gm/document-1.
Stopping the approval process will prevent the document from further circulation along the workflow queue and remove any existing approval status.
OK
Cancel

3. Complete the following fields:

Field	Description
To	Enter the email address(es) or click **uPerform Users** to select users from a list.
Subject	Edit the default subject text, as necessary.
Message	As desired, add information to the default message text.

4. Click **OK**.

Deleting a Workflow Group

1. Click **Workflow** on the left menu to display a list of existing workflows.
2. Click **Delete Workflow** on the left menu.

To delete:
1. Which items to remove?
(select or unselect all)
Human Resources
2. Confirm
Removing the selected items will remove them from this Folder. If items are present in other contexts (as indicated by *) then they will continue to exist in those other contexts.
OK
Cancel

3. Select the checkbox to the left of the workflow to be deleted or, optionally, select the checkbox next to **Select All**.
4. Click **OK** to confirm.
5. Click **OK** to delete.

Deleting a workflow is not the same as stopping a workflow. Deleted workflows cannot be recovered. Documents using this workflow continue to be processed.

Viewing Workflow History

Via the server workspace you can view a document's most recent workflow history so you can keep track of workflow events as they occur. Events you can track include:

- ❒ Version
- ❒ Owner
- ❒ Modified Date
- ❒ Modified By
- ❒ Workflow Status
- ❒ Approval Setting
- ❒ Approved by
- ❒ Next Approver
- ❒ Workflow Start Date
- ❒ Workflow End Date

Viewing the Workflow History

1. Navigate to the document cover page.

   The document cover page for uPerform content is located in the *Translations* area of the binder.

2. Click **Show Workflow History** on the left menu.

3. Review the following information:

Field	Description
Version	The version number for the document in workflow.
Owner	The name of the uPerform user who owns the document.
Modified Date	The last time the document was modified.
Modified By	The name of the uPerform user who last modified the document.

Field	Description
Workflow Status	The following values are available: Approved, Rejected, and In Process
Approval Setting	Displays approved/rejected status for the document.
Approved by	If the document has been approved by one or more reviewers during workflow, the approvers are listed.
Next Approver	If the document is still within an active workflow, the next approver in the sequence is displayed.
Workflow Start Date	The date the workflow began.
Workflow End Date	The date the workflow ended.

When a new version of a document is checked in, the version number will be incremented and a new entry will display in the workflow history. Workflow history information will be cleared out if a new version of a document is checked in, or is automatically globalized when a definition is updated.

Chapter 8: Collaborating on Content

Via the ANCILE uPerform server workspace, authors and administrators can view both author-generated and user-generated discussion forums. In addition, authors, administrators, and end users can use the Tell Others feature to send hyperlinks to content of interest to other uPerform users.

Introduction to Collaboration

There are two types of discussions in uPerform: document-level and folder-level.

- Document-level: Document-level discussions are created automatically when a new document is created and exist in both the Document Library (private) and Website (public) spaces. Author-to-author discussions and end user-to-author feedback are private to authors. End users contribute feedback via the Send Feedback link available on website content pages. There are also public discussions that are viewable within the website context. These include end user-to-end user discussions and end user-to-author discussions. End users contribute to these public discussions via the Website Discussion link available on website content pages.

- Folder-level: Folder-level discussions are created by Administrators in the Document Library or the website. They are not tied to a specific document or folder but exist as independent entities. Administrators can create as many different discussions as they like in a folder and they can be moved to other folders within their context. That is, Document Library folder-level discussions must remain in the Document Library and website discussions must remain in the website context.

Discussions can be viewed by authors and administrators via the server workspace.

Viewing Discussions

You can view a summary list of both author and website discussions and also drill down to read individual discussion messages. Discussions are displayed in a standard threaded format to indicate the hierarchy of message replies.

Viewing a Discussion

1. Click in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Navigate to the desired folder.

   To view a folder-level discussion, click on the hyperlink of the discussion.
5. Perform one of the following options:

If You Want To	Then
View a folder-level discussion	Click on the hyperlink of the discussion.
View an author or website discussion for uPerform content	Click on the content name. Under *Translations*, select the translation that contains the discussion you want to view. Go to Step 7.
View an author or website discussion for a managed document	Click on the content name. Go to Step 7.

6. Perform one of the following options:

If You Want To	Then
View an Author Discussion	In the *Author Discussion* area, view a list of the author discussion entries. To view the contents of long messages or to view all entries, click **Author Discussion**.
View a Website Discussion	In the *Website Discussion* area, view a list of the user discussion entries. To view the contents of long messages or to view all entries, click on **Website Discussion**.

7. Click on the hyperlink of the message you want to read.

Using Discussion Entries

You can create and reply to discussion entries from directly within the uPerform server workspace.

Creating a Discussion Entry

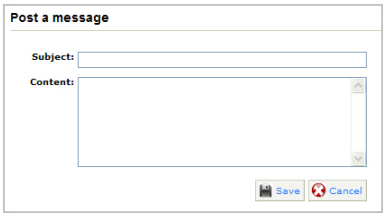
1. Navigate to the desired folder in the uPerform server workspace.
2. Perform one of the following options:

If You Want To	Then
Create an author or website discussion	Go to Step 3.
Create a folder-level discussion	Click **Add Discussion** on the left menu. Enter **Name** and **Description**. Click **Save**.

3. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

4. Scroll down to the *Author Discussion* or *Website Discussion* area of the window.
5. Click **Author Discussion** or **Website Discussion**.
6. Click **New Message** on the left menu.



7. Complete the following fields:

Field	Description
Subject	Enter the message subject.
Content	Enter the text of the message.

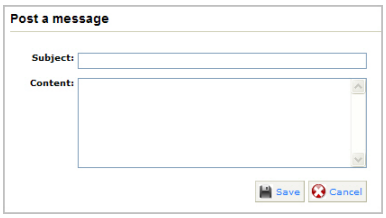
8. Click **Save**.

Replying to a Discussion Entry

1. Navigate to the desired folder in the uPerform server workspace.
2. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

3. Scroll down to the *Author Discussion* or *Website Discussion* area of the window.
4. Click **Author Discussion** or **Website Discussion**.
5. Click **Reply to message** on the left menu.



6. Complete the following fields:

Field	Description
Subject	Enter the message subject.
Content	Enter the text of the message.

7. Click **Save**.

Using Subscriptions Within a Discussion

You can subscribe to a discussion to be notified of new messages in the discussion. You can receive notifications regarding your subscription via email and/or your personal page.

An owner is automatically subscribed to the author and website discussions associated with content created by the owner.

Subscribing to a Folder or Discussion

1. Go to the folder in the server workspace.
2. Select one of the following options to subscribe to the folder:

If You Want To	Then
Add to your favorites located on the server home page.	Click **Add To My Favorites**. (To remove from your favorites, click **My Favorites** on the Home page and then click **Delete**.)
Subscribe to the folder to receive a notification when messages are posted	Click **Subscribe** on the left menu. Specify your desired personal page notification options. Click **OK**. (To unsubscribe from the folder, click **Unsubscribe** on the left menu. Then, click **OK**.)

3. Select one of the following options to subscribe to a discussion:

If You Want To	Then
Subscribe to an Author or Website Discussion	Go to Step 4.
Subscribe to a folder-level discussion	Navigate to the discussion cover page. Click **Subscribe** on the left menu. (To unsubscribe from the discussion, click **Unsubscribe** on the left menu. Then, click **OK**.)

4. Navigate to the document cover page in the folder or server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

5. Scroll down to the *Author Discussion* or *Website Discussion* area of the window.

6. Click **Author Discussion** or **Website Discussion**.

7. Select one of the following options to subscribe to the document:

If You Want To	Then
Add to your favorites located on the server home page.	Click **Add To My Favorites**. (To remove from your favorites, click **My Favorites** on the Home page and then click **Delete**.)
Add yourself to the recipient list to receive copies of messages posted to the discussion	Click **Add Me To Discussion**. Then click **Add Me To Discussion** again. (To remove yourself from the discussion, click **Remove Me From Discussion** on the left menu. Then, click **Remove Me From Discussion** again.)
Subscribe to the discussion to receive a notification when messages are posted	Click **Subscribe** on the left menu. Specify your desired personal page notification options. Click **OK**. (To unsubscribe from the discussion, click **Unsubscribe** on the left menu. Then, click **OK**.)

Managing Discussions

Administrators can delete messages within a discussion thread.

Deleting a Message in a Discussion

1. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

2. Scroll down to the *Author Discussion* or *Website Discussion* area of the window.

3. Click **Author Discussion** or **Website Discussion**.

4. Click **Remove Messages** on the left menu.

To delete:
1. Which items to remove?
(select or unselect all)
Page 2 Correction
2. Confirm
Removing the selected items will remove them from this Author Discussion. If items are present in other contexts (as indicated by *) then they will continue to exist in those other contexts.
Removing folders will delete all of their items if they exist in a single context, as will removing messages with attachments or other objects with items under them.
OK
Cancel

5. Select the checkbox(es) of the message(s) to delete or, optionally, click **Select All**.

6. Click **OK** to confirm your selection(s).

7. Click **OK** to delete your selection(s).

Using the Tell Others Feature

You can use the Tell Others feature to send an email containing a link to a particular object within the uPerform server. A Tell Others link can be sent to one or more uPerform users.

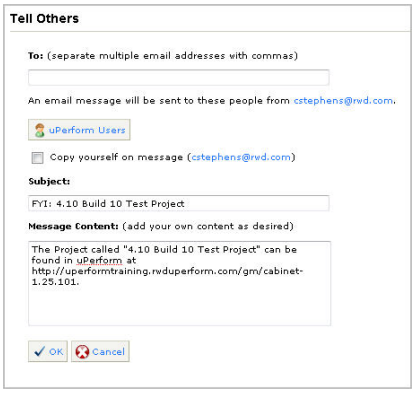
The email message you send is customizable and contains a link to the item of interest to provide quick and easy access.

Creating a Tell Others Notification

1. Go to the document cover page in the server workspace.

   The document cover page for uPerform content is located within the *Translations* area of the binder.

2. Click **Tell Others** on the left menu.


Tell Others
To: (separate multiple email addresses with commas)
An email message will be sent to these people from cstephens@rwd.com.
uPerform Users
Copy yourself on message (cstephens@rwd.com)
Subject:
FYI: 4.10 Build 10 Test Project
Message Content: (add your own content as desired)
The Project called "4.10 Build 10 Test Project" can be found in uPerform at http://uperformtraining.rwduperform.com/gm/cabinet-1.25.101.
OK
Cancel

3. Complete the following information:

Field	Description
To	Enter one or more recipient email addresses. If you specify multiple email addresses, separate each with a comma. To specify users from the uPerform address book, click **uPerform Users**.
Subject	As desired, modify the default email subject text.
Message Content	As desired, provide additional text to the email body.

4. To copy yourself on the message, select the **Copy yourself on message** checkbox.

5. Click **OK**.

Chapter 9: Working with the Glossary

ANCILE uPerform allows you to maintain a centralized database of terms and definitions used in procedural content. This glossary functionality ensures authors are using consistent and approved definitions.

Authors can retrieve definitions and suggest alternate definitions. Administrators manage the glossary settings, including the use of rich-text formatting in definitions and the tracking of term usage.

The glossary functionality is available only in procedural content.

Introduction to the Glossary

Glossary functionality is provided with uPerform to allow you to maintain a database of terms and definitions for procedural content that is checked into the uPerform server. The glossary allows you to insert customized, business-specific definitions into your documents.

There is one glossary database for the entire uPerform instance. However, the definition for a term may vary between the projects within the uPerform instance.

Maintaining terms and definitions in one repository allows for documents to be updated quickly and accurately. New terms can be added, and changes can be made to definitions for existing terms within the glossary.

Once you have standardized the valid terms and definitions, the globalization process is used to update definitions (descriptions) of terms (fields) within the documents prior to making them available to your users.

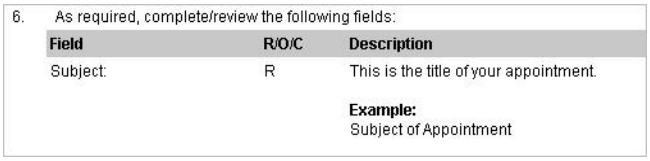
You can create and manage multiple definitions for a single term based on the folder location of the document. Glossary will then insert the appropriate definition into your document based on this location and the document language.

Only one language can be assigned to a definition.

Your administrator can enable or disable the use of a centralized glossary. If the centralized glossary is disabled, authors can enter definitions directly into a document.

Specifying Term Definitions

Terms and definitions are displayed in recorded Field/Description tables within the document view of uPerform content. Field description tables that are inserted during editing as a step will not support glossary functionality. The following is an illustration of a recorded Field/Description table.



6. As required, complete/review the following fields:

Field	R/O/C	Description
Subject:	R	This is the title of your appointment. **Example:** Subject of Appointment

If your project is using a centralized glossary, definitions are created and managed by the administrator and inserted into the document during check in or during a process called globalization. You can also manually insert or update definitions during editing. In addition, you can suggest a new definition for the administrator's consideration.

Updating Definitions

Prior to updating definitions from the editor, you must have checked the document into the server and closed the document in the uPerform editor.

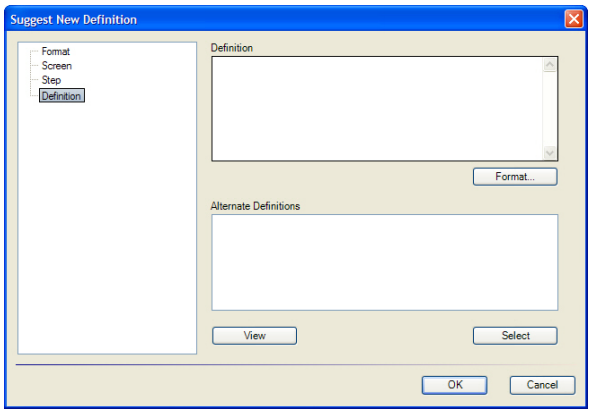
1. Select **OPEN > OPEN FROM ANCILE UPERFORM SERVER...**.
2. Select the document to open.
3. Click **OK**.
4. Click the **Document** tab.
5. Select **TOOLS > UPDATE TERM DEFINITIONS**.

The Field/Description tables in the document are updated with definitions from the server.

Suggesting a Definition

1. Open a document in the editor.
2. Click the **Document** tab.
3. Navigate to the Field/Description table.

4. Click **Suggest Definition** to the right of the definition cell.



You can review the alternate definitions available in other document library contexts from the *Suggest New Definition* window.

5. Enter the definition in the **Definition** text box.
6. Optionally, click **Format...** to apply formatting options.
7. Click **OK**.
8. At the confirmation prompt, click **Yes** to submit the definition as a suggestion.

Entering a Definition When the Centralized Glossary is Disabled

1. Create or open a document in the editor.
2. Click the **Document** tab.
3. Navigate to the Field/Description table.
4. Enter the definition in the **Description** column of the Field/Description table.

Browsing the Glossary from the Editor

From the editor, you can browse the entire glossary database and search for one or more specific terms. The term page displayed when browsing the glossary lists all definitions for the term and its synonyms.

If you are using the editor in standalone or offline mode, the glossary is not available and the associated menu option is grayed out.

Viewing a Term and Associated Information

1. Select **TOOLS > BROWSE GLOSSARY...** from the editor to display the glossary page in a web browser window.
2. Enter the term in the **Find Term** field.
3. Click **Search**.
4. Review the following information:

Field	Description
Definitions	Lists all definitions for the term.
Suggestions	Lists any suggestions contributed by authors. Only glossary administrators can view suggestions.
Synonyms	Lists any synonyms available for the term.

Managing Glossary Settings

The glossary administrator is typically responsible for maintaining the instance-wide glossary settings. These settings affect all projects in the uPerform instance.

You must be a part of the uPerform Glossary Administrators group to configure glossary settings. For detailed information on uPerform groups, refer to Managing Users, Roles, and Groups (on page 29).

The following settings can be managed from the server workspace:

- Using a centralized glossary: If you do not select to enable the centralized glossary, authors can enter definitions directly into a uPerform document.
- Using rich text in definitions: You can specify the use of rich text formatting (for example, bold, italic, and underline) in your definitions.
- Specifying a default language: You can indicate the language that will be used for a definition if there is no definition in the document's language.

Enabling the Centralized Glossary

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.

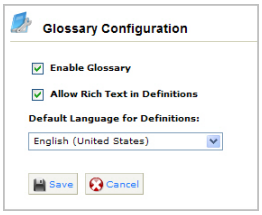
4. Select the **Enable Glossary** checkbox.
5. Click **Save**.

Disabling the Centralized Glossary

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.
4. Deselect the **Enable Glossary** checkbox.
5. Click **Save**.

Enabling Rich Text in Definitions

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.



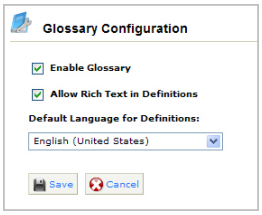
4. Select the **Allow Rich Text in Definitions** checkbox.
5. Click **Save**.

Disabling Rich Text in Definitions

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.
4. Deselect the **Allow Rich Text in Definitions** checkbox.
5. Click **Save**.

Setting the Default Language for Definitions

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.



4. Select the desired default language from the **Default Language for Definitions** drop-down list.

   A definition in the default language is used when a term does not have a definition in the document language. For this reason, you should ensure that all terms have a definition available in the default language.

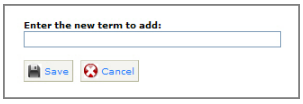
5. Click **Save**.

Adding Terms and Definitions

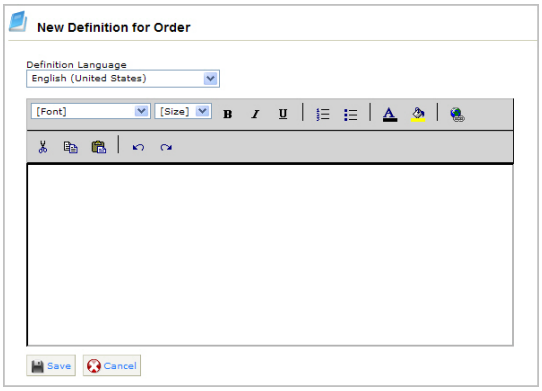
When you add a new term, the term is available to all projects in the uPerform instance. Each project can have one or more unique definitions for the term.

Adding a Term and Definition

1. Click **Glossary** on the left menu of the server workspace.
2. Click **Add Term** on the left menu.



3. Enter the new term in the **Enter the new term to add** field.
4. Click **Save** to display the *New Definition* form.



5. Select the language for the definition from the **Definition Language** drop-down list.
6. Enter the definition in the text field.

If you have enabled the use of rich text in definitions, you can set the font, font size, and other character attributes for your definition text. You can also use color in your definition text and background and embed a hyperlink within the definition. For more information, refer to Formatting a Definition (on page 177).

7. Click **Save**.
8. Add a context to the term as described in Assigning a Context to a Definition (on page 174).

Adding a Definition to an Existing Term

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term to which the definition should be added in the **Find Term** field.
3. Click **Search**.
4. Click **Add Definition** on the left menu.
5. Select the language for the definition from the **Definition Language** drop-down list.
6. Enter the definition in the text field.

   If you have enabled the use of rich text in definitions, you can set the font, font size, and other character attributes for your definition text. You can also use color in your definition text and background and embed a hyperlink within the definition. For more information, refer to Formatting a Definition (on page 177).

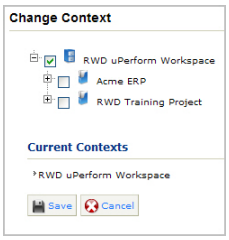
7. Click **Save**.
8. Add a context to the term as described in Assigning a Context to a Definition (on page 174).

Assigning a Context to a Definition

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term to which the definition should be added in the **Find Term** field.
3. Click **Search**.

4. In the *Definitions* portion of the window, click **Edit**.

5. Click **Change Context** on the left menu.



6. To apply this definition to all projects in the instance, select the **[workspace name]** checkbox. To apply this definition only to specific projects or folders (contexts), select the checkbox for the project(s) or folder(s).

The definition can reside in the glossary database without a context, but in order for a definition to be used in a document; at least one context must be applied to the definition.

7. Click **Save**.

Updating Terms and Definitions

You cannot edit a term, but you can add a term as a synonym and delete the original term. For additional information on synonyms, refer to Managing Synonyms (on page 181).

Editing a Definition

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term associated with the definition in the **Find Term** field.
3. Click **Search**.

4. Locate the desired definition and context in the *Definitions* portion of the window, and click **Edit**.
5. Edit the definition.
6. Click **Save**.

Content associated with the updated definition will be automatically sent to the globalize queue. Additionally, any content that has been approved via workflow and previously published will be sent to the publishing queue. This allows you to republish the document. Workflow history is retained for content related to the definition.

Formatting a Definition

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term associated with the definition in the **Find Term** field.
3. Click **Search**.
4. Click **Edit** in the *Definitions* portion of the window.
5. Highlight the definition text and format as desired using the following options. Depending on your rich-text formatting settings, some of these options may not be available:

Field	Description
Font	Select the desired font from the drop-down list.
Size	Select the desired font size from the drop-down list.
Bold, Italic, Underline	Select from the bold, italic, and underline options as desired.
Numbering, Bullets	Format the highlighted text as a numbered or bulleted list.
Text Color	Specify the desired color for the text.
Background Color	Specify the desired background color for the definition text.
Insert Link	Format the highlighted text as a hyperlink to open in the same window or a new window.

6. Click **Save**.

Workflow history is retained for content related to the definition.

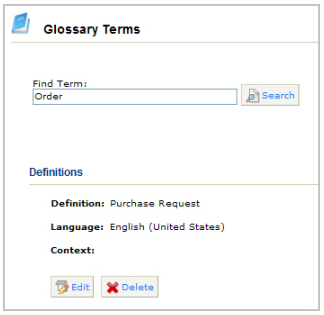
Deleting a Term

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term to be deleted in the **Find Term** field.
3. Click **Search**.
4. Click **Delete Term** on the left menu.
5. Click **OK**.

Deleting a term removes the term and its definition from the glossary. If the term has associated synonym(s), the definitions of the synonyms remain.

Deleting a Definition

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term associated with the definition to be deleted in the **Find Term** field.
3. Click **Search**.



4. Locate the desired definition in the *Definitions* portion of the window.
5. Click **Delete**.
6. Click **OK** on the confirmation window displayed.

Managing Glossary Suggestions

Authors can suggest alternate definitions for a term from the editor workspace.

The glossary administrator is responsible for reviewing glossary suggestions and accepting or rejecting the suggestion.

You must be a Glossary Administrator to review and act on suggestions. For detailed information on uPerform groups, refer to Managing Users, Roles, and Groups (on page 29).

Viewing Suggestions

1. Click **Glossary** on the left menu of the server workspace.
2. Click **View All Suggestions** to display a list of all terms with suggestions.
3. Click on a term to view the suggestion(s).
4. Scroll to the *Suggestions* portion of the window to view the suggestion list.

Suggestions in the same language and context of an existing definition display only as a link. Click on a link to view the suggestion.

Accepting a Suggestion

1. Click **Glossary** on the left menu of the server workspace.
2. Click **View All Suggestions** to display a list of all terms with suggestions.
3. Click on a term to view the suggestion(s).
4. Scroll to the *Suggestions* portion of the window, and click **Accept** to add this suggestion as a new definition.

Accepting a Suggestion Intended to Replace the Current Definition

1. Click **Glossary** on the left menu of the server workspace.
2. Click **View All Suggestions** to display a list of all terms with suggestions.

3. Click on a term to view the suggestion(s).

4. Scroll to the *Definitions* portion of the window to view the suggestion hyperlink to the right of **Context** and click on the suggestion hyperlink.

5. Under *Suggestions*, click **Replace Existing** to replace the current definition.

Accepting a Suggestion to Create a New Definition

1. Click **Glossary** on the left menu of the server workspace.

2. Click **View All Suggestions** to display a list of all terms with suggestions.

3. Click on a term to view the suggestion(s).

4. Scroll to the *Definitions* portion of the window to view the suggestion hyperlink to the right of **Context**.

5. Click on the suggestion hyperlink, and select **Add New**.

6. Add a context to the definition as described in Assigning a Context to a Definition (on page 174).

Rejecting a Suggestion

1. Click **Glossary** on the left menu of the server workspace.

2. Click **View All Suggestions** to display a list of all terms with suggestions.

3. Click on a term to view the suggestion(s).

4. Scroll to the *Suggestions* portion of the window, and click **Reject** for the suggestion(s).

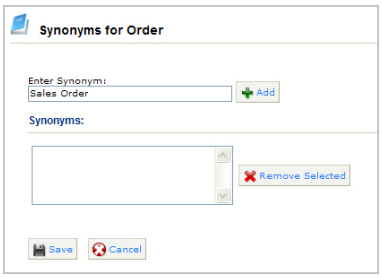
Managing Synonyms

Synonyms allow the administrator to establish a relationship between two or more terms.

If you remove a synonym, you remove the relationship between the affected terms. However, removing a synonym does not delete the term or definitions.

Adding a New Synonym for a Term

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the existing term associated to which you want to add a new synonym in the **Find Term** field.
3. Click **Search**.
4. Click **Change Synonyms** on the left menu.



5. Enter the new synonym in the **Enter Synonym** field.
6. Click **Add**.

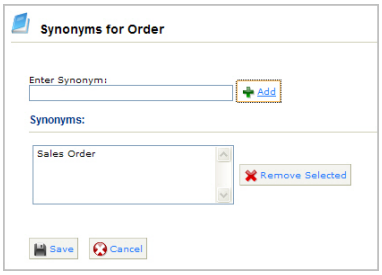
   To enter multiple synonyms, repeat Step 5 and Step 6.

7. Click **Save**.

Removing a Synonym

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term associated with the synonym in the **Find Term** field.
3. Click **Search**.

4. Click **Change Synonyms** on the left menu.



5. In the **Synonyms** list, select the synonym(s) to be removed.

6. Click **Remove Selected**.

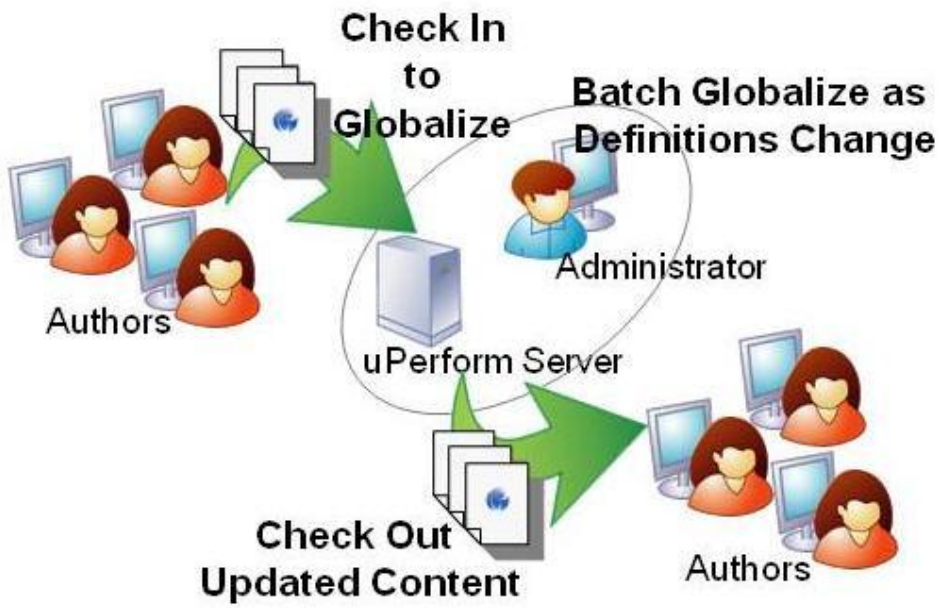
7. Click **Save**.

Using Globalize

Definitions for terms in uPerform content can be updated using a process called globalization. During globalization, definitions are inserted into documents and new terms in documents are gathered for inclusion in the central glossary on the server. The globalization process affects only text within recorded Field/Description tables. Text within Field/Description tables manually inserted during editing is ignored.

If a term exists in the document, but not in the glossary, the term is added to the glossary with a blank definition. The glossary will then need to be updated with a customized definition of the new term. You can then globalize to distribute the update to the documents containing the term.

If your glossary administrator has enabled the centralized glossary, all uPerform documents will be globalized upon check in. Non-uPerform documents, such as managed documents, are not globalized.



The glossary functionality is not case-sensitive, meaning that a term in a document will be considered the same as a term in the glossary regardless of whether the same capitalization rules are applied. Purchase order and Purchase Order in documents are considered the same term. The Glossary is character-string dependent, however; Purchase order (one space) is different than Purchase order (two spaces).

During globalization, each globalized document receives a minor version update only if modifications have been made to the document (for example, 1.1, 2.1, 3.2).

Globalizing Documents

You can globalize a single document directly from the editor workspace. In addition, the globalize queue on the server can be configured to automatically globalize documents daily at off-peak hours. Documents are automatically placed in the queue when 1) the definition value is changed, 2) the definition is removed, 3) a new definition is added, or 4) the assigned definition context is changed or removed, or a new context is added to terms that are contained in that document.

In addition, uPerform documents are automatically globalized when the documents are checked into the server.

Globalizing a Single Document From the Editor

1. Select **OPEN > OPEN FROM ANCILE UPERFORM SERVER...**.
2. Select the document to open.
3. Click **OK**.
4. Click the **Document** tab.
5. Select **TOOLS > UPDATE TERM DEFINITIONS**.

In this scenario, the document will not display in the globalize history list.

Globalizing a Batch of Documents on a Daily Frequency

The uPerform server can be configured to automatically globalize the documents in the globalize queue daily during off-peak hours. Documents are automatically placed in the queue when 1) the definition value is changed, 2) the definition is removed, 3) a new definition is added, or 4) the assigned definition context is changed or removed, or a new context added.

For detailed information on creating a daily globalize task, refer to the *ANCILE uPerform Administration* user manual.

Via the globalize queue, you can also immediately process one or more documents. For complete details on the globalize queue, refer to Viewing the Globalize Queue and History (on page 185).

Viewing the Globalize Queue and History

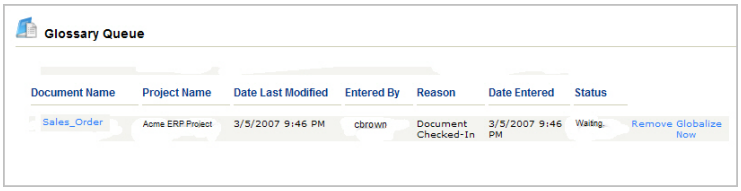
You must be a part of the uPerform Glossary Administrators group to configure glossary settings and manage the glossary queue. For detailed information on uPerform groups, refer to Managing Users, Roles, and Groups (on page 29).

The globalize queue displays the documents that require update. The globalize history list displays a record of globalization events (both documents globalized upon check in and daily globalize runs) for the current day. You can view history records from the last 30 days.

After 30 days, history records are removed on a first-in/first-out basis. History records are not archived.

Viewing the Globalize Queue

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.
4. Click **View Globalize Queue** on the left menu.



5. Review the following information:

Field	Description
Document Name	The name of the document included in the globalize processing.
Project Name	The name of the project containing the document.
Date Last Modified	The date of the last document modification.
Entered By	The author who last added the document.
Reason	The activity which caused the document to be added to the queue.
Date Entered	The date and time the document entered the queue.
Status	The status of the globalization activity (In Queue, Waiting, Processing, or a failure indicator) for the current document.

6. As necessary, click **Previous** or **Next** to navigate through the queue.

7. Perform one or more of the following actions:

If You Want To	Then
Empty the globalize queue	Click **Delete All** on the left menu.
Immediately process all documents in the globalize queue	Click **Globalize All** on the left menu.
Refresh the globalize queue	Click **Refresh Queue** on the left menu.
Remove a single document	Click **Remove** next to the document you want to remove.
Globalize a single document	Click **Globalize Now** next to the document you want to globalize.

Viewing the Globalize History

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.
4. Click **View History** on the left menu.
5. Review the following information:

Field	Description
Document Name	Lists the title of the globalized document.
Date Started	Lists the date and time the globalize process was started.
Date Completed	Lists the date and time the globalize process was completed.
Terms Processed	Lists the number of uPerform terms processed during the globalization activity. You can click on this hyperlinked number to review the list of terms processed.
Status	Lists the success or failure of the globalization for the document.
Reason	Lists the reason the globalization task was initiated (for example, Document Checked-In).

6. As necessary, click **Previous** or **Next** to navigate through the history list.
7. Optionally, click **View Different Date** on the left menu to select an alternate globalization history date to review.

Subscribing to Glossary Events

Glossary administrators can subscribe to be notified about various glossary activities. Subscription notices can be delivered via the uPerform personal page or email message, or via both methods.

Subscribing to a Glossary Event

1. Click **Glossary** on the left menu of the server workspace.
2. Click **Subscribe** on the left menu.
3. Select one or more of the following events to which you want to subscribe:

Field	Description
Globalization Complete	A batch globalization task has completed.
New Term Added	A new term has been manually added to the glossary or added as a result of globalization.
New Definition	A new definition has been manually added to the glossary.
New Suggestion Added	An author has suggested a new definition for a term.

4. Select one or more of the following options:

Option	Description
Post notifications to my Personal Page.	Select this option to receive your subscription notification in the **My Alerts** section of your uPerform personal page.
Send notifications in an email report to [your email address].	Select this option to receive your subscription notification via email message. Specify one of the following email notification types: daily, weekly, or immediately after an event.

5. Click **OK**.

Tracking Term and Definition Usage

The following glossary reports are available to allow you to report on term usage and undefined or unused terms:

- Term Usage: Displays documents that include a particular term.
- Undefined Terms: Displays terms found during globalization that do not have a definition or an assigned context.
- Unused Terms: Displays terms that are not used in any globalized document.
- Term Summary by Project: Displays terms used in all projects in the uPerform instance.

In addition, from the Globalization History list, you can click on a **View All New Terms** or **View All Undefined Terms** hyperlink to view a summary of all new terms and all undefined terms from the current day.

Viewing Term Usage

1. Click **Glossary** on the left menu of the server workspace.
2. Enter the term in the **Find Term** field.
3. Click **Search**.
4. Click **View Term Usage** on the left menu.
5. Review the following information:

Field	Description
Document	Hyperlinked title of the document in which the term is used. Click on the document name to go to the document cover page.
Date Last Modified	Date and time of the last document modification.
Last Modified By	Name of the author who last modified the document.

6. As necessary, click **Previous** or **Next** to navigate through the report.

Viewing Undefined Terms

1. Click **Glossary** on the left menu of the server workspace.
2. Click **View Undefined Terms** on the left menu.
3. Review the following information:

Field	Description
Term	Click on the hyperlinked term name to go to the term page.
Date Last Modified	Date and time of the last term modification.

4. Optionally, to delete an undefined term, click **Delete** to the right of the term.
5. As necessary, click **Previous** or **Next** to navigate through the report.

Viewing Unused Terms

1. Click **Glossary** on the left menu of the server workspace.
2. Click **View Unused Terms** on the left menu.
3. Review the following information:

Field	Description
Term	Click on the hyperlinked term name to go to the term page.
Date Last Modified	Date and time of the last term modification.
Number of Definitions	Number of definitions in the database for each term.

4. Optionally, to delete an unused term, click **Delete** to the right of the term.
5. As necessary, click **Previous** or **Next** to navigate through the report.

Viewing Term Summary by Project

1. Click **Glossary** on the left menu of the server workspace.
2. Click **View Term Summary by Project** on the left menu.

3. Choose one of the following options:

Field	Description
Rebuild	Click to rebuild the term summary database.
View Existing	Click to view the existing term summary database.

4. Click **Save** at the prompt to access the Microsoft Excel XML spreadsheet.

In Microsoft Excel 2002, the file is opened as an XML file in the web browser; select the save option in the browser to download the file to your local computer. In Microsoft Excel 2003, the file is automatically opened in Excel. Support for displaying the XML spreadsheet is not available in Microsoft Excel 2000.

5. Open the Microsoft Excel file, and review the following information for each project sheet displayed:

Field	Description
Term	Name of the term.
Context	Context in which the term is used.
Default Language	Language specified in the glossary configuration and the definition for the term in this language.
Other Languages	Additional definitions in other languages.

Importing and Exporting a Glossary and Translations

Import functionality allows you to upload glossary terms and definitions from an external source, as well as import a glossary from ANCILE uPerform. You must ensure the imported file is a tab-delimited text file where the first column contains the term and the second column contains the definition. You can only import one definition per term. If you are working with double-byte characters, the file should be in UTF-8 double-byte format.

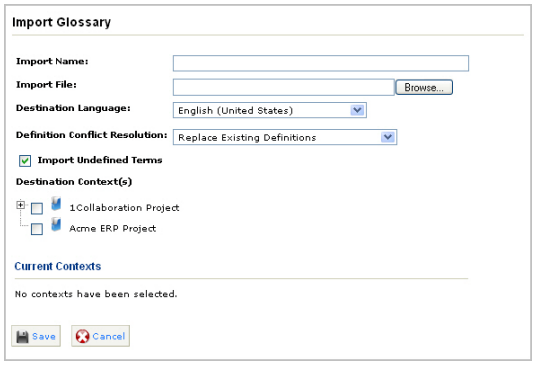
Exporting a glossary allows you to create a tab-delimited file of term and definition pairs in a selected language and context.

Exporting translations allows you to create an XLIFF file for translating existing definitions in multiple languages.

If you plan to migrate an Info Pak glossary, ANCILE recommends that you use the Migration Wizard. For more information, refer to Incorporating Info Pak Content (on page 329).

Importing a Glossary

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.
4. Click **Import** on the left menu.
5. Click **Import Glossary** on the left menu.



6. Complete the following fields:

Field	Description
Import Name	Enter a name for the import.
Import File	Click **Browse...**, and navigate to the file you want to import.
Destination Language	Select the language for the definitions from the drop-down list.
Definition Conflict Resolution	From the drop-down list, select **Replace Existing Definitions**, **Add As Suggestion**, or **Skip Definition**.
Import Undefined Terms	Select the **Import Undefined Terms** checkbox to import undefined terms.

7. Select the project(s) in the *Destination Context(s)* area to assign the glossary to the project(s).

8. Click **Save**.

Importing Translations

Ensure you have exported the glossary for translation and translated the file before importing into the uPerform server. For more information on exporting a glossary or translation file, refer to Exporting a Glossary (on page 193) and Exporting Translations (on page 194).

1. Click **Administration** on the left menu of the server workspace.

2. Click **Server Administration** in the *Administration* area.

3. Click **Glossary** in the *Server Administration* area.

4. Click **Import** on the left menu.

5. Click **Import Translations** on the left menu.

6. Complete the following fields:

Field	Description
Import Name	Enter a name for the import.
Import File	Click **Browse...**, and navigate to the file you want to import.
Definition Conflict Resolution	From the drop-down list, select **Replace Existing Definitions**, **Add As Suggestion**, or **Skip Definition**.

7. Click **Save**.

Viewing and Deleting the Imported Glossary or Translation

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.
4. Click **Import** on the left menu.

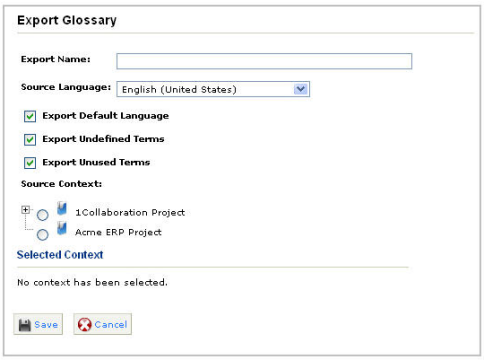
5. Perform one of the following options:

If You Want To	Then
View the imported glossary or translation details	Click **Details**.
Delete an imported glossary or translation	Click **Delete**. You can only delete an imported glossary or translation once the import process is complete.

Exporting a Glossary

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.

3. Click **Glossary** in the *Server Administration* area.
4. Click **Export** on the left menu.
5. Click **Export Glossary** on the left menu.



6. Complete the following fields:

Field	Description
Export Name	Enter a name to describe the exported content. Example: My Export
Source Language	Select the source language for your terms and definitions from the drop-down list.
Export Default Language	Select the **Export Default Language** checkbox to export the default language for the Glossary if the source language does not exist.
Export Undefined Terms	Select the **Export Undefined Terms** checkbox to export undefined terms.
Export Unused Terms	Select the **Export Unused Terms** to export unused terms.

7. Select the context to export definitions from in the *Source Contents* area.
8. Click **Save**.
9. Click **View Details** to download the file **GlossaryExport_[date/time].txt**.

Exporting Translations

1. Click **Administration** on the left menu of the server workspace.
2. Click **Server Administration** in the *Administration* area.
3. Click **Glossary** in the *Server Administration* area.

4. Click **Export** on the left menu.

5. Click **Export Translations** on the left menu.

6. Complete the following fields:

Field	Description
Export Name	Enter a name to describe the exported content. Example: My Export
Source Language	Select the source language for your terms and definitions from the drop-down list.
Target Languages	Select the language(s) you want to export and translate into or update.

7. Click **Save**.

8. Click **View Details** to download the file **TranslationExport_[date/time].txt**.

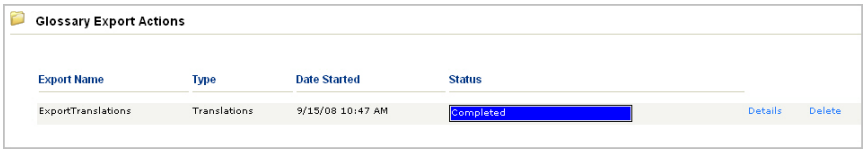
Viewing and Deleting Exported Glossaries and Translations

1. Click **Administration** on the left menu of the server workspace.

2. Click **Server Administration** in the *Administration* area.

3. Click **Glossary** in the *Server Administration* area.

4. Click **Export** on the left menu.



5. Perform one of the following options:

If You Want To	Then
View the exported glossary or translation details	Click **Details**.
Delete an exported glossary or translation	Click **Delete**. You can only delete an exported glossary or translation once the export process is complete.

Chapter 10: Using Reports

To track your project progress and status, you can execute several standard reports from the ANCILE uPerform server. In addition to the provided document tracking, workflow status, and published content report, you can also create and execute custom reports.

Introduction to Reporting

Reports are used to track project progress and activity within the uPerform server. Reports can be generated for uPerform and managed documents. Once a report is generated, the results can be exported or viewed online. Four standard reports are available within the uPerform server:

- Assessment Performance - Displays a detailed report for courses and assessments assigned to a project. Assessment scores are tracked for uPerform courses and simulations with templates that have SCORM 1.2 or SCORM 2004 packaging enabled. For more information, refer to *Specifying New Template Settings: Publications*.
- Document Tracking - Displays a detailed report of the documents assigned to a project
- Published Content - Displays a detailed report of the published documents assigned to a project
- Workflow Status - Displays a detailed report of the document workflows assigned to a project

System administrators have access to all reports. Project administrators have access only to reporting functionalities within a project for which they are the administrator.

You can create a copy of a standard report and modify the copy using the Save As functionality. This allows you to inherit fields and properties from one report to the next.

You can also create custom reports containing uPerform properties, as well as for hit counts on uPerform content.

A few guidelines to consider regarding uPerform server reports:

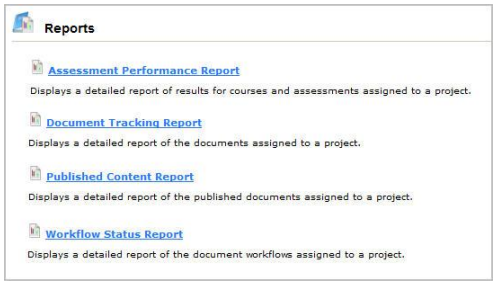
- Punctuation is ignored in content filtering with the exception of keywords separated by a comma or an asterisk used to denote the presence or the absence of a value.
- Stemming is incorporated on all filters. For example, if you enter "general" into a filter field, you will receive a return for "generic."
- The maximum number of hits that can be returned from a report is 10,000.
- Reports do not support server-side paging, which can affect the wait time and performance speed of the server.

Working with Reports

The following basic functionalities apply to all reports within the uPerform server: viewing, exporting, deleting. For information on creating and editing custom and copied reports, refer to Create and Edit Custom Reports (on page 205).

Viewing Reports

1. Click **Reports** in the left menu.


Reports
Assessment Performance Report
Displays a detailed report of results for courses and assessments assigned to a project.
Document Tracking Report
Displays a detailed report of the documents assigned to a project.
Published Content Report
Displays a detailed report of the published documents assigned to a project.
Workflow Status Report
Displays a detailed report of the document workflows assigned to a project.

2. Choose from one of the following options:

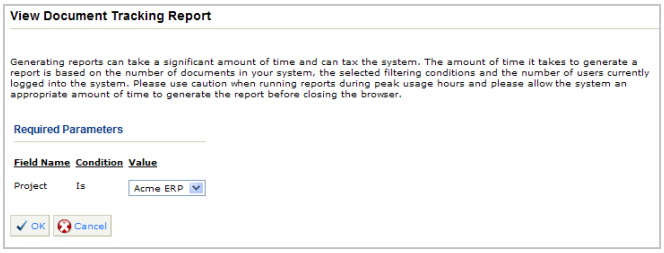
If You Want To	Then
View an assessment performance report	Click **Assessment Performance Report**, and go to Step 5.
View a document tracking report	Click **Document Tracking Report**.
View a published content report	Click **Published Content Report**.
View a workflow status report	Click **Workflow Status Report**. Workflow history information will be cleared if a new version of a document is checked in, or if the document is automatically globalized when a definition is updated.
View a custom report	Click on the name of the custom report.

3. Review the following fields:

Field	Description
Owner	The user who generated the report. Click on this link to obtain information about the user.
Last Modified:	If applicable, the date of the last report definition modification.

Field	Description
Selected Columns	The columns specified for report generation.
Filter	Limitations for what the report will return.

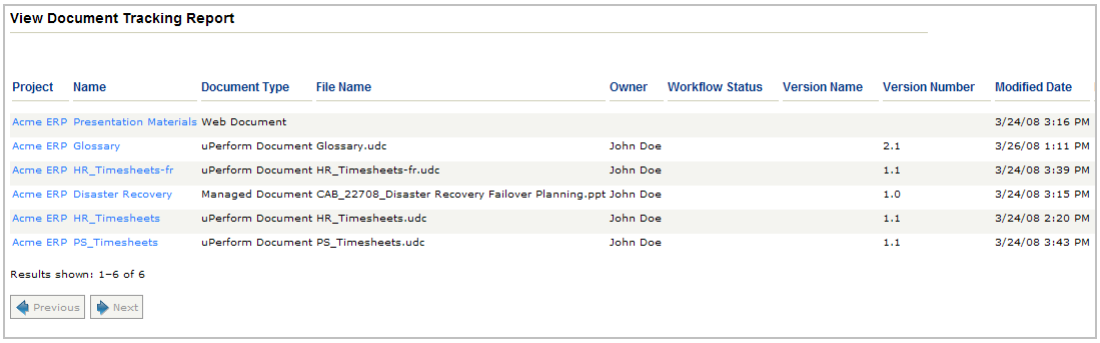
4. Click **View Report** in the left menu.


View Document Tracking Report
Generating reports can take a significant amount of time and can tax the system. The amount of time it takes to generate a report is based on the number of documents in your system, the selected filtering conditions and the number of users currently logged into the system. Please use caution when running reports during peak usage hours and please allow the system an appropriate amount of time to generate the report before closing the browser.
Required Parameters
Field Name Condition Value
Project Is Acme ERP
OK
Cancel

5. Review the following information:

Field	Description
Field Name	Displays the built-in parameters for report generation.
Condition	Displays the search parameters specified for the report generation.
Value	Displays the name of the project for which you want to generate a report. Select a project from the drop-down list.

6. Click **OK**.


View Document Tracking Report
Project Name Document Type File Name Owner Workflow Status Version Name Version Number Modified Date
Acme ERP Presentation Materials Web Document 3/24/08 3:16 PM
Acme ERP Glossary uPerform Document Glossary.udc John Doe 2.1 3/26/08 1:11 PM
Acme ERP HR_Timesheets-fr uPerform Document HR_Timesheets-fr.udc John Doe 1.1 3/24/08 3:39 PM
Acme ERP Disaster Recovery Managed Document CAB_22708_Disaster Recovery Failover Planning.ppt John Doe 1.0 3/24/08 3:15 PM
Acme ERP HR_Timesheets uPerform Document HR_Timesheets.udc John Doe 1.1 3/24/08 2:20 PM
Acme ERP PS_Timesheets uPerform Document PS_Timesheets.udc John Doe 1.1 3/24/08 3:43 PM
Results shown: 1–6 of 6
Previous
Next

7. Review the list of documents available in the report.

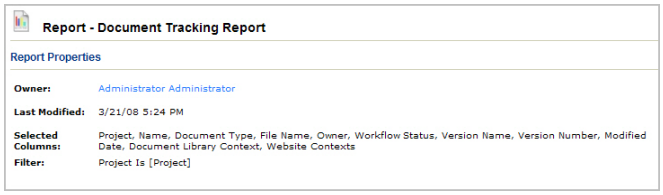
8. Optionally, click **Previous** or **Next** to scroll to the next page.

Exporting Reports

1. Click **Reports** in the left menu.

2. Choose from one of the following options:

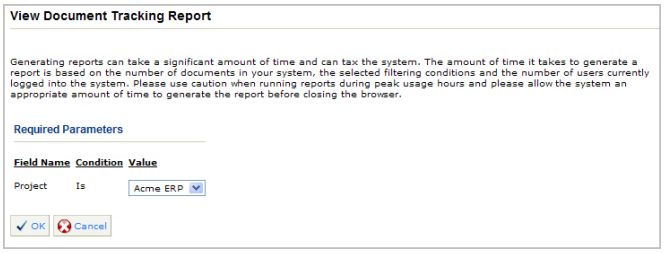
If You Want To	Then
Export an assessment performance reports.	Click **Assessment Performance Report**, and go to Step 5.
Export a document tracking report	Click **Document Tracking Report**.
Export a published content report	Click **Published Content Report**.
Export a workflow status report	Click **Workflow Status Report**.
Export a custom report	Click on the name of the custom report.


Report - Document Tracking Report
Report Properties
Owner:
Administrator Administrator
Last Modified:
3/21/08 5:24 PM
Selected Columns:
Project, Name, Document Type, File Name, Owner, Workflow Status, Version Name, Version Number, Modified Date, Document Library Context, Website Contexts
Filter:
Project Is [Project]

3. Review the following fields:

Field	Description
Owner	The user who generated the report. Click on this link to obtain information about the user.
Last Modified:	If applicable, the date of the last document modification.
Selected Columns	The columns specified for report generation.
Filter	Limitations for what the report will return.

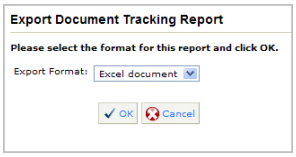
4. Click **View Report** in the left menu.


View Document Tracking Report
Generating reports can take a significant amount of time and can tax the system. The amount of time it takes to generate a report is based on the number of documents in your system, the selected filtering conditions and the number of users currently logged into the system. Please use caution when running reports during peak usage hours and please allow the system an appropriate amount of time to generate the report before closing the browser.
Required Parameters
Field Name
Condition
Value
Project
Is
Acme ERP
OK
Cancel

5. Select a project from the **Value** field.

6. Click **OK**.

7. Click **Export** in the left menu.



8. Select an export format from the **Export Format** drop-down list.

9. Click **OK**.

The export may take several minutes.

10. Perform one of the following options:

If You Want To	Then
Open the exported report	Click the radio button next to **Open with**. Click **OK.**
Save the exported report	Click the radio button next to **Save to Disk**. Click **OK**. Open the file locally on your computer.

Using Save as to Copy a Standard Report

1. Click **Reports** in the left menu.

2. Choose from one of the following options:

Copy functionality is not available for assessment reports.

If You Want To	Then
Copy a document tracking report	Click **Document Tracking Report**.
Copy a published content report	Click **Published Content Report**.
Copy a workflow status report	Click **Workflow Status Report**.

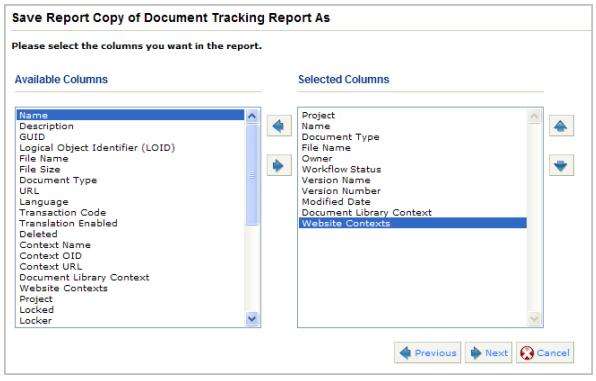
3. Click **Save Report As** in the left menu.

Save Report Copy of Document Tracking Report As
This wizard will allow you to create a custom report which can be run against this uPerform server. Please enter a name and description for this report.
Report Name:
Copy of Document Tracking Report
Description:
Displays a detailed report of the documents assigned to a project.
Template:
None
Search all templates
Next
Cancel

4. Complete the following fields:

Field	Description
Report Name	Enter a unique name for the report.
Description	Enter an optional description for the report.
Template	Optionally, select the template associated with the report from the drop-down list. This gives you the ability to create filters using template properties.
Search all templates	Select this option to determine if you want to search properties for all templates. Deselect this option to specify that you want the search performed only on the template selected in the **Template** drop-down list.

5. Click **Next**.



6. Select a column from the **Available Columns** listbox.

Custom template properties are noted with an asterisk (*).

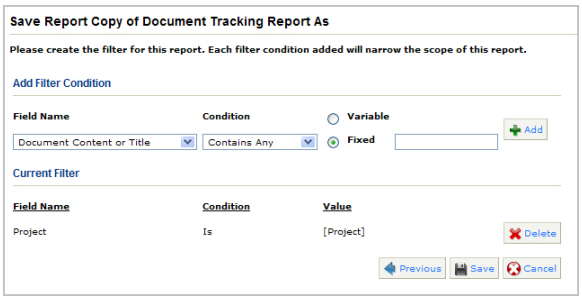
7. Click the right arrow to move the field into the **Selected Columns** list box.

8. Optionally, click the left arrow to remove a field from the **Selected Columns** list.

9. Click the up and down arrows to reorder items in the **Selected Columns** list.

10. Repeat Steps 6 through 9 to add additional fields to the report.

11. Click **Next**.



12. Select a field name from the **Field Name** drop-down list.

13. Select a condition from the following list:

Field	Description
Contains Any	Contains any keyword.
Contains All	Contains all of the keywords.
Does not contain	Does not contain any of the keywords.

14. Choose from the following options:

If You Want To	Then
Specify the field name as a variable object when generating reports	Select the **Variable** radio button.
Specify the field name as a fixed object when generating reports	Select the **Fixed** radio button.

15. Click **Add**.

16. Repeat Steps 12 through 15 to add additional filters to the report.

17. Optionally, click **Delete** next to a filter to remove it from the report.

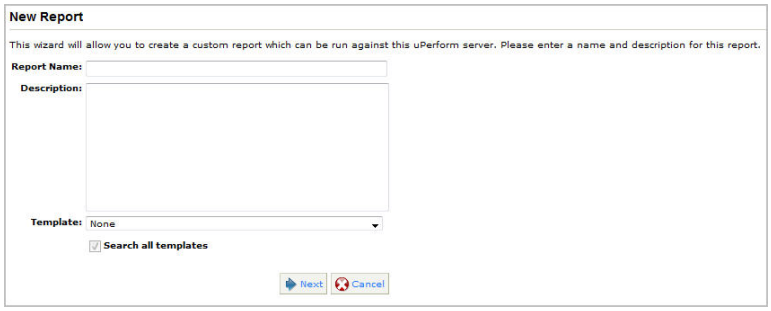
18. Click **Save**.

Refer to Viewing Reports (on page 199) and Exporting Reports (on page 200) for information on viewing the report output.

Create and Edit Custom Reports

Creating Custom Reports

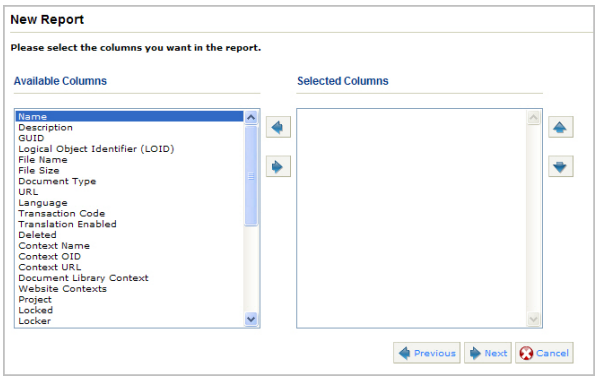
1. Click **Reports** in the left menu.
2. Click **New Report** in the left menu.


New Report
This wizard will allow you to create a custom report which can be run against this uPerform server. Please enter a name and description for this report.
Report Name:
Description:
Template:
None
Search all templates
Next
Cancel

3. Complete the following fields:

Field	Description
Report Name	Enter a name for the report.
Description	Enter a description for the report.
Template	Optionally, select the template associated with the report from the drop-down list. This gives you the ability to create filters using template properties.
Search all templates	Select this option to determine if you want to search properties for all templates. Deselect this option to specify that you want the search performed only on the template selected in the **Template** drop-down list.

4. Click **Next**.



5. Select a field from the **Available Columns** listbox.

6. Click the right arrow to move the field into the **Selected Columns** list box.

   If you want to generate a report for usage statistics, select **Hit Count**, **Hit Count Reset On**, and/or **Hit Count Reset By**.

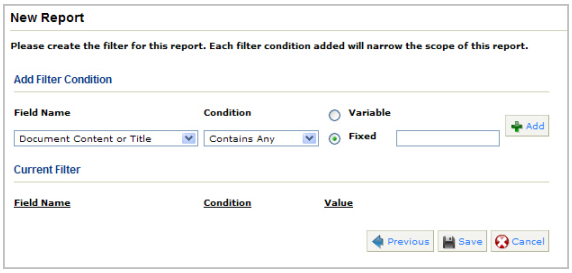
   Custom template properties are noted with an asterisk. For example: Transaction Code(s)*

7. Repeat Steps 5 and 6 to add additional fields to the report.

8. Optionally, click the left arrow to remove fields from the **Selected Columns** list.

9. Click the up and down arrows to reorder fields in the **Selected Columns** list.

10. Click **Next**.



11. Select a field name from the **Field Name** drop-down list.

12. Select a condition from the following list:

Field	Description
Contains Any	Contains any keyword. Reports do not handle comma delimited lists within the document properties. The filter criteria look for an exact match in the document property.
Contains All	Contains all of the keywords.
Does not contain	Does not contain any of the keywords.

13. Choose from the following options:

If You Want To	Then
Specify the field name as a variable object when generating reports	Select the **Variable** radio button.
Specify the field name as a fixed object when generating reports	Select the **Fixed** radio button.

14. Click **Add**.

15. Repeat Steps 11 through 14 to add additional filters to the report.

16. Optionally, click **Delete** next to a filter to remove it from the report.

17. Click **Save**.

Refer to Viewing Reports (on page 199) and Exporting Reports (on page 200) for information on viewing the report output.

Editing Custom and Copied Reports

1. Click **Reports** in the left menu.

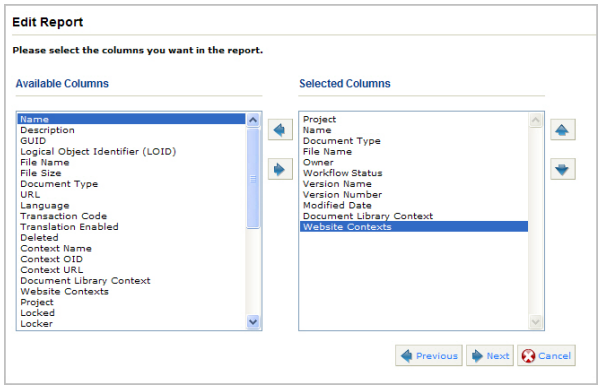
2. Click on the name of the custom or copied report you want to edit.

3. Click **Edit Report**.

4. Complete the following fields:

Field	Description
Name	Enter a name for the report.
Description	Enter a description for the report.
Template	Optionally, select the template associated with the report from the drop-down list. This gives you the ability to create filters using template properties.
Search all templates	Select this option to determine if you want to search properties for all templates. Deselect this option to specify that you want the search performed only on the template selected in the **Template** drop-down list.

5. Click **Next**.



6. Select a field from the **Available Columns** listbox.

   If you want to generate a report for usage statistics, select **Hit Count**, **Hit Count Reset On**, and/or **Hit Count Reset By**.

   Custom template properties are noted with an asterisk. For example: Transaction Code(s)*

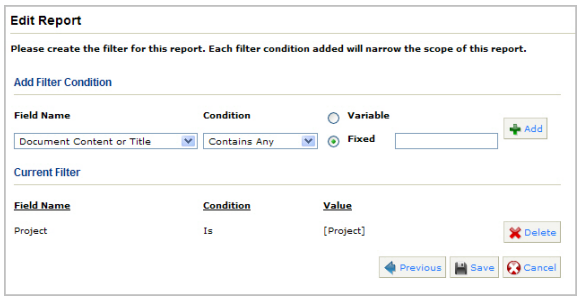
7. Click the right arrow to move the field into the **Selected Columns** list box.

8. Repeat Steps 6 and 7 to add additional fields to the report.

9. Optionally, click the left arrow to remove fields from the **Selected Columns** list.

10. Click the up and down arrows to reorder fields in the **Selected Columns** list.

11. Click **Next**.



12. Select a field name from the **Field Name** drop-down list.

13. Select a condition from the following list:

Field	Description
Contains Any	Contains any keyword.
Contains All	Contains all of the keywords.
Does not contain	Does not contain any of the keywords.

14. Choose from the following options:

If You Want To	Then
Specify the field name as a variable object when generating reports	Select the **Variable** radio button.
Specify the field name as a fixed object when generating reports	Select the **Fixed** radio button.

15. Click **Add**.

16. Repeat Steps 12 through 15 to add additional filters to the report.

17. Optionally, click **Delete** next to a filter to remove it from the report.

18. Click **Save**.

Refer to Viewing Reports (on page 199) and Exporting Reports (on page 200) for information on viewing the report output.

Deleting a Custom Report

By default, you cannot delete standard reports from the uPerform server.

1. Click **Reports** in the left menu.
2. Click on the name of the custom report.
3. Click **Delete Report** in the left menu.
4. At the prompt, click **OK**.

Reports are permanently deleted from the server. You cannot recover a deleted report.

Chapter 11: Using Author Templates

Author templates in ANCILE uPerform control the formatting and publishing options available to authors. Templates allow you to set standards and maintain consistency within your authoring team.

Introduction to Author Templates

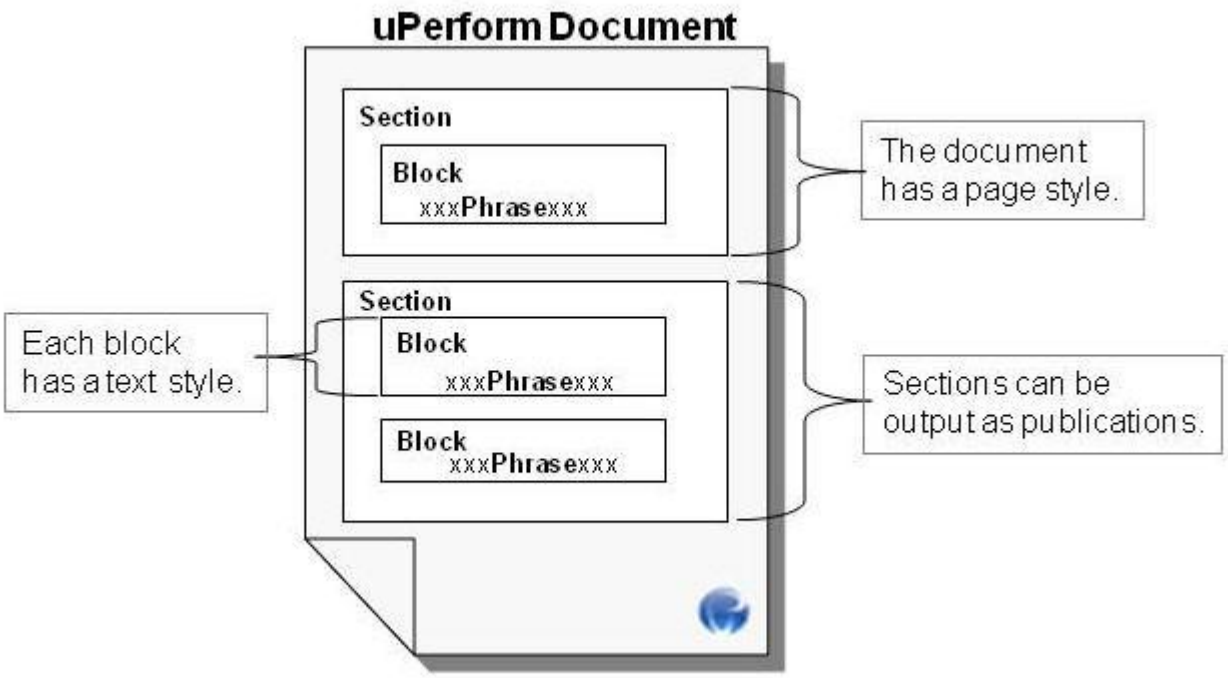
A key capability of uPerform is the ability to allow administrators to establish and enforce standards through the use of author templates. Author templates contain configuration and style settings to control the appearance and content of your training materials. Templates help you to enforce consistency via these predetermined formatting and configuration settings. Consistent formatting enables your users to quickly and easily find information in all content.

Author templates provide control over the following elements:

- Sections - represents a single, contiguous group of blocks in a document.
- Blocks - a content element containing the information required to render a discrete item in all available views.
- Styles - a group of formatting options that relate to paragraphs or character text.
- Publications - a designator indicating content output.
- Phrases - a group of culture-specific boilerplate text items that are placed into a block by default.
- uPerform Properties - metadata such as document title, owner, and version used to describe content.
- Image, Data, and Language Management - allows you to control images, data fields, and languages associated with a template.
- Info Pak Properties - allows you to view a list of document types, content location, and websafe paths of migrated ANCILE Info Pak documents.

You can edit author templates via the uPerform editor.

The following diagram illustrates many of the basic uPerform procedural document elements that you can modify within the template:



Managing Author Templates

At the start of your project, you should create a new template and specify your configuration settings.

Multiple templates can be used on a project. The project selection determines the templates that are available to authors. Each uPerform file is linked to a template via the template's unique 32-bit identifier.

Any author can create or modify a template, but only authors with proper permissions can check the modified template into the uPerform server to make it available to other authors and administrators.

During creation and edit, author templates are stored on your computer in the following locations:

- For Windows XP: C:\Documents and Settings\[user name]\Application Data\ANCILE\uPerform\Version X.X\templates
- For Windows Vista and Windows 7: C:\User\App Data\Roaming\ANCILE\uPerform\VersionX.X\templates

You can manage local templates directly through uPerform. Author templates have a .udt file extension.

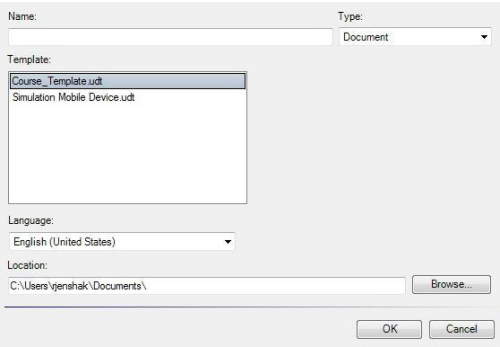
Create and Open a New Author Template

The following best practices apply to your use of author templates:

- Create a new template using the uPerform **FILE > NEW** menu. Do not copy and rename a .udt file. The copy process renames the file but does not modify the template's unique identifier. A uPerform document is linked to a template via the template identifier, not the template name.
- After creating a .udt file, do not rename the file via Microsoft Windows Explorer as this may cause an author to have multiple template files with the same identifier.

Creating a New Author Template

1. From the editor, select **FILE > NEW**.



2. Enter a name for the new template in the **Name** field.
3. Select **Template** from the **Type** drop-down list.
4. In the **Template** listbox, select a template from which you would like to create a new template.
5. Click **OK**.

Refer to the following subsections for more information on customizing the template.

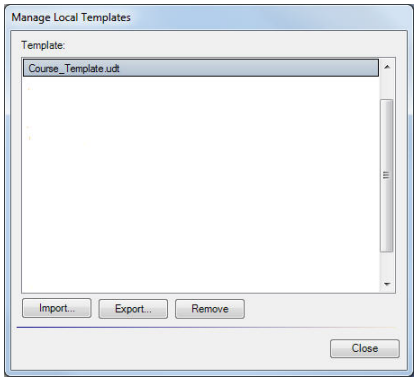
Opening a Template

1. From the editor, select **FILE > OPEN > TEMPLATE.**
2. Select the template you want to open.
3. Optionally, select **Lock template for editing**.
4. Click **OK**.

The standard author template delivered with the product cannot be opened in the editor.

Managing Local Templates

1. Select **FILE > MANAGE LOCAL TEMPLATES...**.



2. Perform one of the following options:

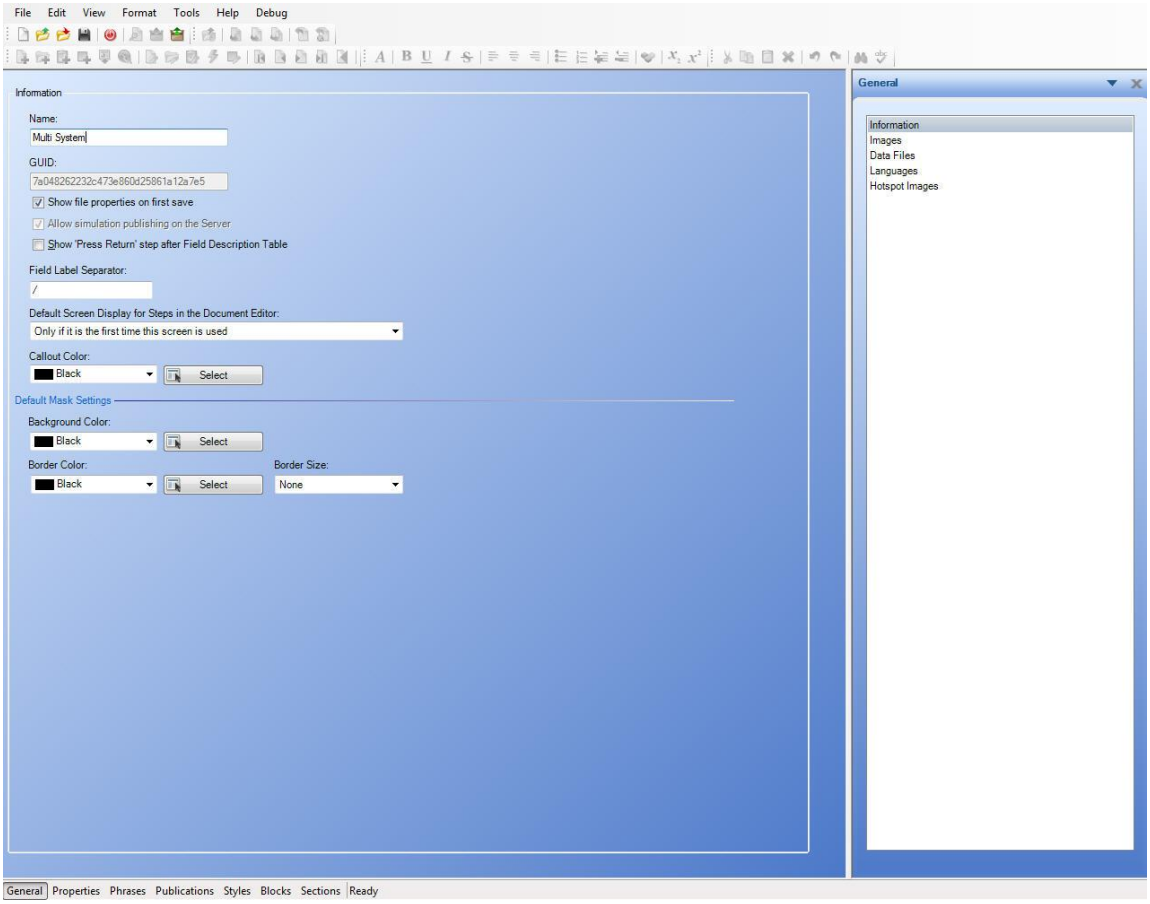
If You Want To	Then
Import a template	Click **Import...**. Navigate to the template and click **Open**. Click **OK**.
Export a template	Select a template from the list. Click **Export...**. Navigate to the template and click **Open**. Enter a name for the template.
Remove a template	Select a template from the list. Click **Remove**. Click **Yes**.

Specifying New Template Settings: General

Specifying General Settings: Information

1. From the editor, open the new template.
2. Click **General** on the status bar.

3. Click **Information** in the task pane.



4. Review the following information:

Field	Description
Name	Specifies the name of the new template.
GUID	Specifies the unique ID of the template.
Show file properties on first save	Select the **Show file properties on first save** checkbox to display the *Properties...* window to the author upon the first save during a new recording.
Allow simulation publishing on the uPerform Server	Enable or disable the **Allow simulation publishing on the uPerform Server** checkbox to set the default behavior on the document *Properties...* window. An author can change this setting for an individual document. This setting applies only to server publishing of simulations. Choosing this option enables simulation publishing on the uPerform Server for all simulations created using this template.

Field	Description
Show 'Press Return' step after Field Description Table	Select **Show 'Press Return' step after Field Description Table** to display the return step after a Field/Description table.
Field Label Separator	Specifies what character should be used to separate multiple labels in a Field/Description table.
Callout Color	Select the color to be used for displayed callouts. Optionally, click **Select** to choose a color.

5. Under **Default Screen Display for Steps in the Document Editor**, choose from the following options:

Field	Description
Always display	Displays new screens for steps.
Never	Does not display new screens for steps.
Only if it is the first time this screen is used	Displays a new screen in the document editor only if the screen is different from the previous step.

6. Under **Default Mask Settings**, choose from the following options:

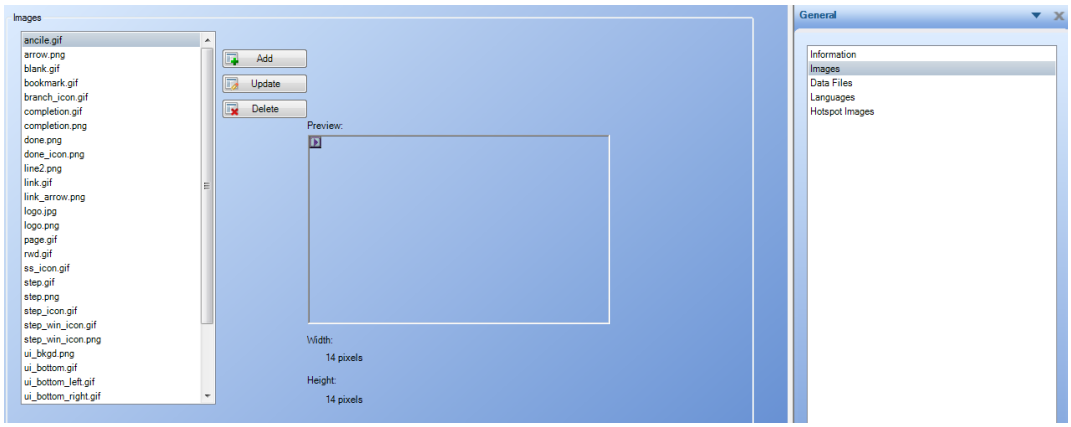
Field	Description
Background Color	Click **Select** to specify a default background color.
Border Color	Click **Select** to specify a default border color.
Border Size	Select a size from the drop-down list.

7. Select **FILE > SAVE** to save the template.

Specifying General Settings: Images

1. From the editor, open the new template.
2. Click **General** on the status bar.

3. Click **Images** in the task pane.



4. Perform one of the following options:

If You Want To	Then
Add an image to the template	Click **Add**. Navigate to the image and click **Open.**
Update an image	Select the image to update, and click **Update**. Navigate to the updated image, and click **Open**.
Delete a custom image	Select the custom image from the list, and click **Delete**. At the prompt, click **Yes**. You cannot delete the standard images delivered with uPerform.

A preview of the selected image will display to the right.

5. Select **FILE > SAVE** to save the template.

Specifying General Settings: Data Files

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Click **Data Files** in the task pane.

4. Perform one of the following options:

If You Want To	Then
Add a data file to the template	Click **Add**. Navigate to the data file and click **Open.**
Update a data file	Select the data file to update, and click **Update**. Navigate to the updated data file, and click **Open**.
Modify a data file	Select a data file, and click **Modify**. Edit the file, and select **FILE > SAVE**. Basic knowledge of HTML, XSL, and Java is required. Optionally, click **Change Editor ...** to specify a different data file editor.
Delete a custom data file	Select the custom data file from the list, and click **Delete**. At the prompt, click **Yes**. You cannot delete the standard data files delivered with uPerform.

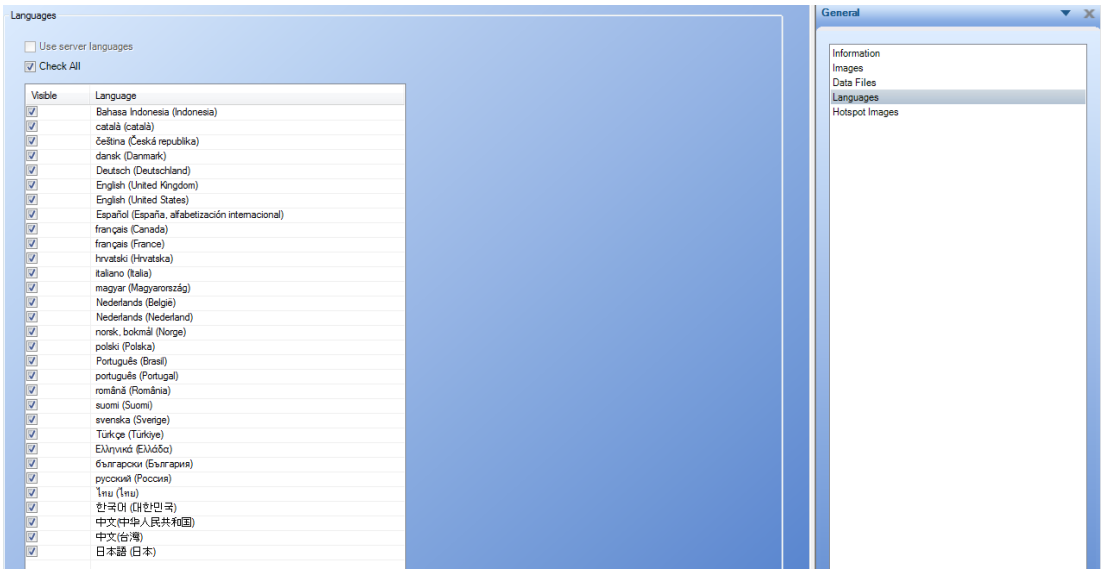
5. Select **FILE > SAVE** to save the template.

Specifying General Settings: Languages

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Click **Languages** in the task pane.



4. Perform one of the following options:

If You Want To	Then
Manually select languages to be enabled in this template	Deselect **Use server languages**. Select or deselect one or more checkboxes in the **Visible** column.
Select all languages to be used in this template.	Select **Check All**.

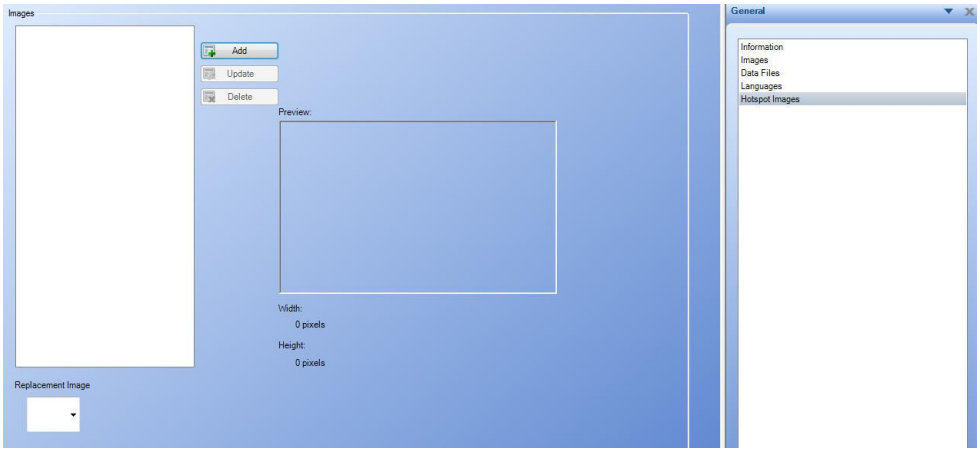
5. Select **FILE > SAVE** to save the template.

Specifying General Settings: Hotspot Images

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Click **Hotspot Images** in the task pane.



4. Perform one of the following options:

If You Want To	Then
Add an image	Click **Add**. Browse to the image and click **Open**.
Update an image	Select an image from the *Images* list and click **Update**. Browse to the updated image and click **Open**.
Delete an image	Select an image from the *Images* list and click **Delete**. Click **Yes**.
Choose a replacement image	Select an image from the *Images* list. Click the *Replacement Image* drop down list and select an image.

5. Select **FILE > SAVE** to save the template.

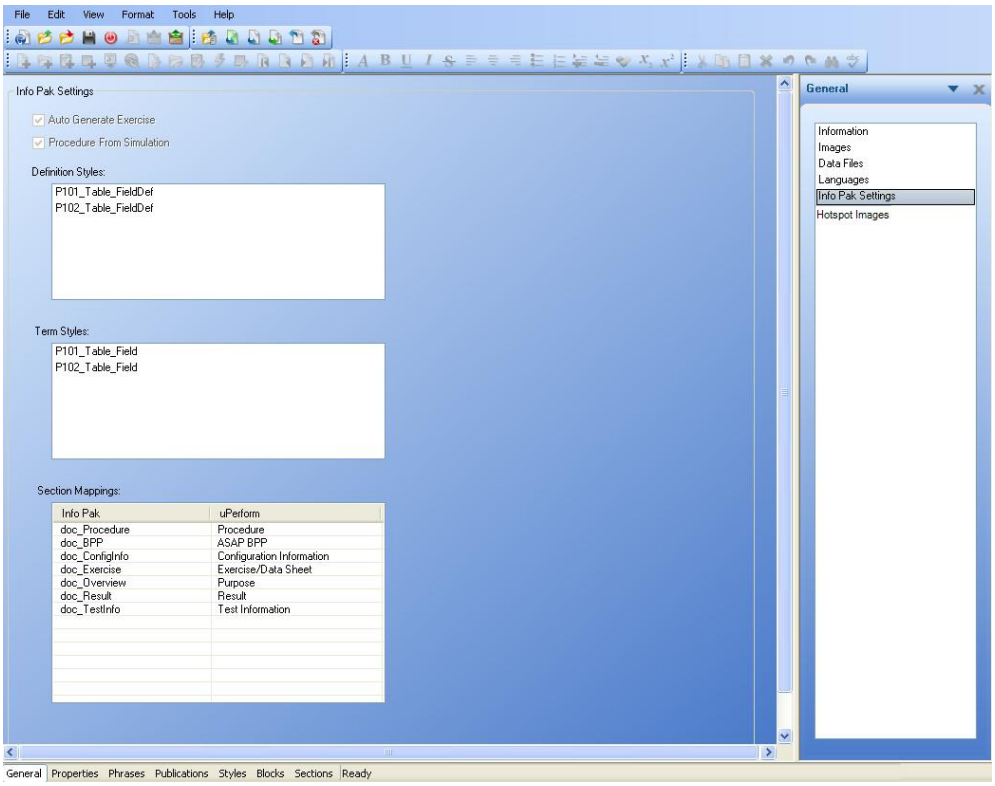
Specifying General Settings: View Info Pak Settings

Info Pak settings are available only for templates used in conjunction with the Migration Wizard. Info Pak settings are not configurable within the template. For more information on Migration Wizard, refer to Incorporating Info Pak Content (on page 329).

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Select **Info Pak Settings** from the *Task Pane*.



4. Review the following fields:

The following options are not configurable within the uPerform template.

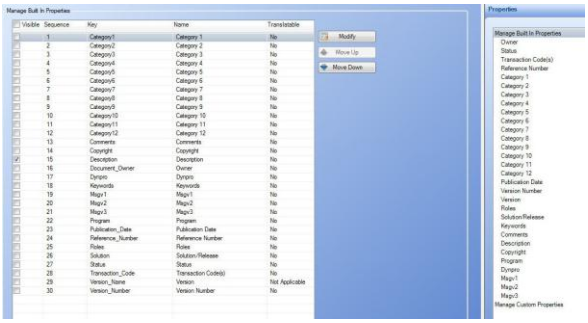
Field	Description
Auto Generate Exercise	The **Auto Generate Exercise** option is selected during the migration. This option is not configurable within the uPerform template.
Procedure From Simulation	The **Procedure from Simulation** option is selected during the migration. This option is not configurable within the uPerform template.
Definition Styles	Displays the definition styles used in the original Info Pak content. This option is not configurable within the uPerform template.
Term Styles	Displays the term styles used in the original Info pak content. This option is not configurable within the uPerform template.
Section Mappings	Displays the mapped sections specified during migration. This option is not configurable within the uPerform template.

5. Click **FILE > SAVE** to save the template.

Specifying New Template Settings: Properties

Managing Built In Properties

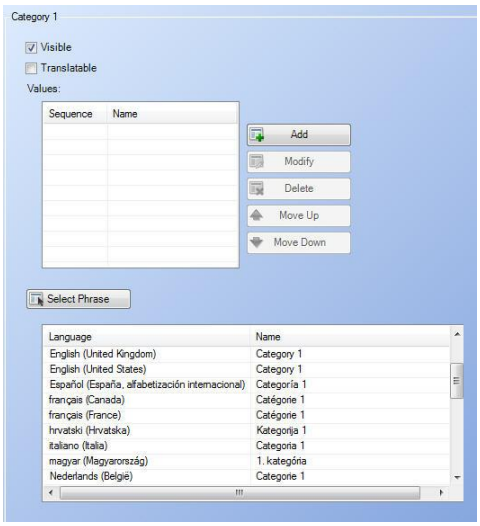
1. From the editor, open the new template.
2. Click **Properties** on the status bar.
3. Select a built-in property from the *Task Pane*.



4. To make the property visible to authors in the *Properties*... window, click the **Visible** checkbox.
5. Perform one of the following options:

If You Want To	Then
Move the value earlier in the list	Click **Move Up** one or more times as needed.
Move the value later in the list	Click **Move Down** one or more times as needed.

6. Click **Modify**.



7. Perform one of the following options:

If You Want To	Then
Make the value visible.	Check the **Visible** checkbox.
Make the value translatable.	Check the **Translatable** checkbox. This option is only available if the **Visible** checkbox is checked.
Add a value	Click **Add**. Enter a value. Click **OK**.
Modify a value	Select a value. Click **Modify**. Edit the text. Click **OK**.
Delete a value	Select a value. Click **Delete**. Click **Yes**.
Add a custom phrase	Click **Select Phrase**. Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Click **Select Phrase**. Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

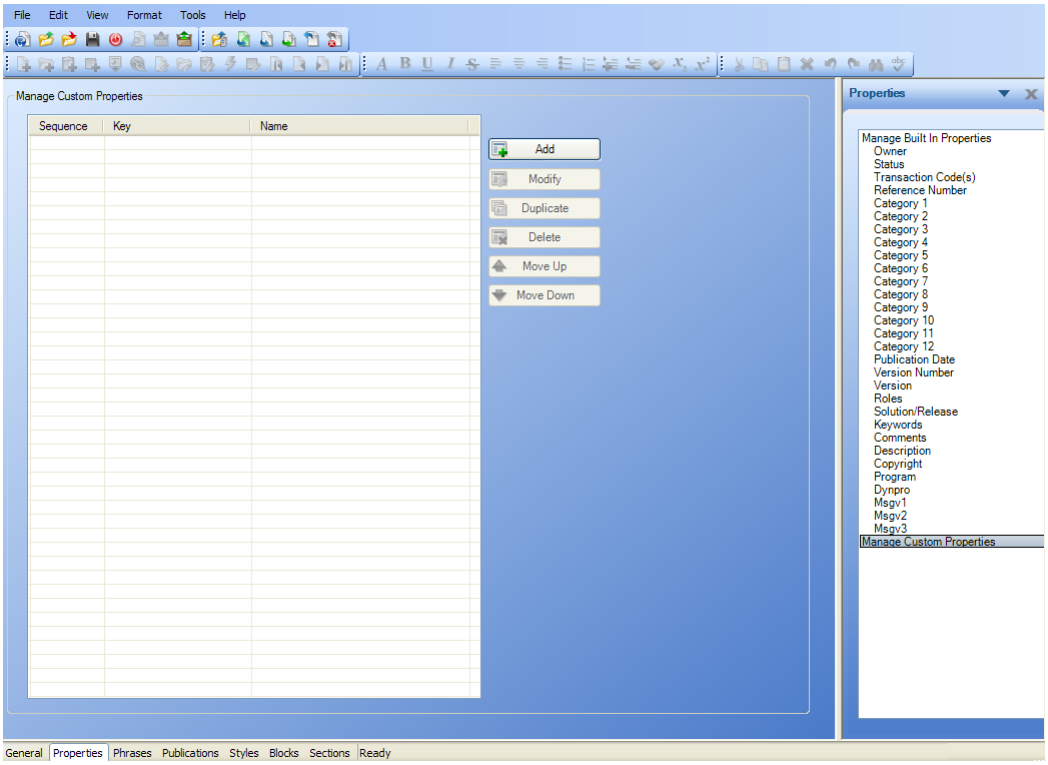
8. Select **FILE > SAVE** to save the template.

Creating and Managing Custom Properties

1. From the editor, open the new template.

2. Click **Properties** on the status bar.

3. Click *Manage Custom Properties* in the task pane.



4. Select one of the following options:

If You Want To	Then
Add a new custom property	Click **Add**. Select a language from the drop-down list. Enter a name. Click **OK**. Go to Step 5.
Modify an existing custom property	Go to Step 5.
Duplicate an existing custom property	Select a custom property from the *Task pane* and click **Duplicate**. Select a language from the drop-down list. Enter a name. Click **OK**. Go to Step 5.
Delete the selected property	Select a custom property from the *Task pane* and click **Delete**. Click **Yes**. Go to Step 5.
Move the property earlier or later in the list.	Select a custom property from the *Task pane* and click **Move Up** or **Move Down** one or more times as needed.

5. Select the custom property from the *Task Pane*.

6. Click **Modify**.

7. Perform one of the following options:

Based on the item selected, some options may not display.

If You Want To	Then
Make the property visible to authors	Check the **Visible** checkbox.
Make the property translatable	Check the **Translatable** checkbox. This option is only available if the **Visible** checkbox is checked and there are no values assigned to the property.
Add values to the property	Click **Add**. Enter a value. Click **OK**.
Modify values to the property	Select a value. Click **Modify**. Edit the text. Click **OK**.
Delete values to the property	Select a value. Click **Delete**. Click **Yes**.
Move the value	Select a value. Click **Move Up** or **Move Down** one or more times as needed.

8. Click **Select Phrase.**

9. Perform one of the following options:

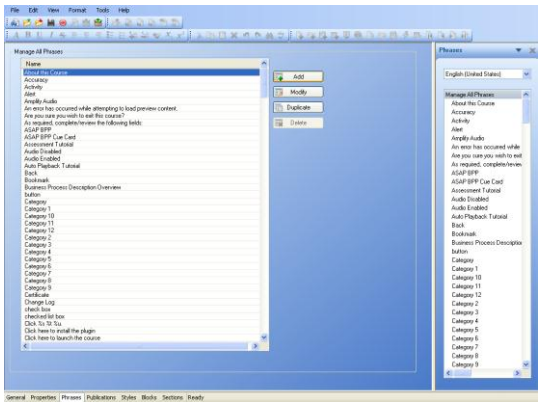
If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK.**
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

10. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Phrases

Managing Phrases

1. From the editor, open the new template.
2. Click **Phrases** on the status bar.



3. Select a language from the **Language** drop-down list in the *Task Pane*.
4. Choose a phrase name.

The following table lists the phrases for actions during recording and the common phrases for keyboard keys.

Field	Description
Click %s %t %u	%s = label % t= control type %u = image
Double-click %s %t %u	%s = label % t= control type %u = image
Right-click %s %t %u	%s = label % t= control type %u = image
Right double-click %s %t %u	%s = label % t= control type %u = image
Type %s in the %t %u	%s = typed text
Drag %s to %t	%s = first image %t = second image

Up, **Down**, **Left**, **Right**	Press "Up" Press "Down" Press "Left" Press "Right"
Page Up, **Page Down**	Press "Page Up" Press "Page Down"
Tab	Press "Tab"
Return	Press "Return"
Home, **End**	Press "Home" Press "End"
Insert, **Delete**	Press "Insert" Press "Delete"

5. Perform one of the following options:

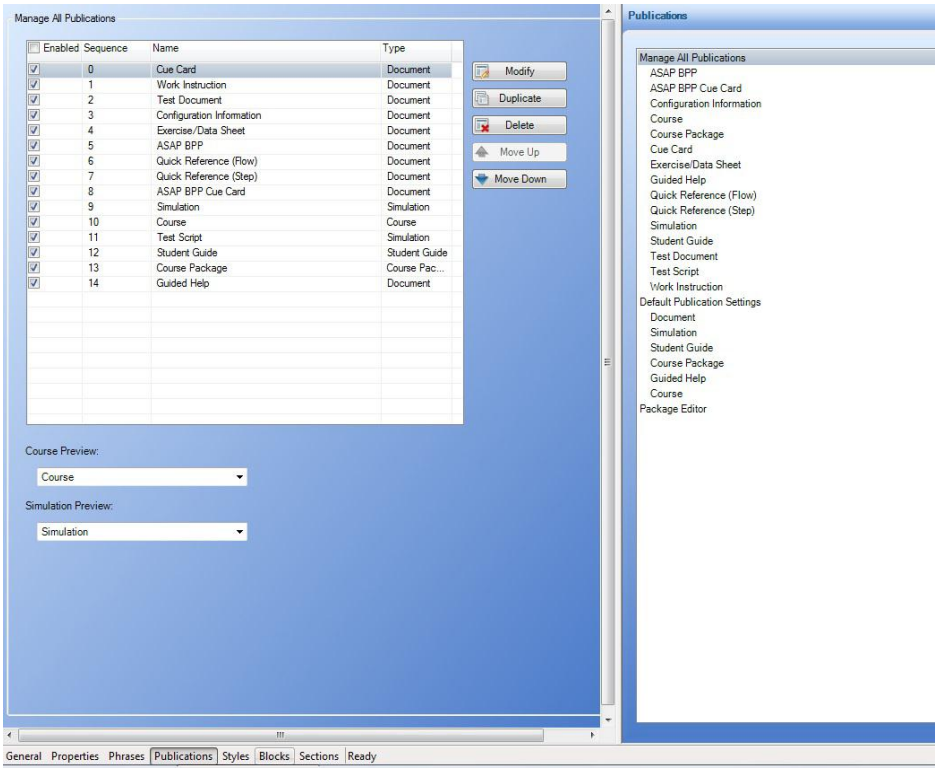
If You Want To	Then
Add a phrase	In the content pane, click **Add**. Select a language from the left navigation pane. Enter the phrase in the **Content** pane. Click **OK**.
Modify a phrase	Select a phrase in the content pane. Click **Modify**. Optionally, select a new language from the left navigation pane. Edit the phrase in the **Content** pane.
Duplicate a phrase	Select the phrase you want to duplicate from the *Content Pane*. Click **Duplicate**.
Delete a phrase	Select the phrase you want to delete. Click **Delete**. At the prompt, click **Yes**.

6. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Publications

Manage All Publications

1. From the editor, open the new template.
2. Click **Publications** on the status bar.



3. Click the checkbox in the **Enabled** column next to the publication types you want to enable.

4. Choose from the following options:

Field	Description
Course Preview	Select an option from the drop-down list to display which style course you want to preview. You can create an option by duplicating and modifying the **Course** publication type as described in Duplicating, Deleting, and Moving Publication Types (on page 232).
Simulation Preview	Select an option from the drop-down list to display which style simulation you want to preview. You can create an option by duplicating and modifying the **Simulation** publication type as described in Duplicating, Deleting, and Moving Publication Types (on page 232).

5. Select a publication type from the *Manage All Publications* list in the task pane.

6. Click **Select Phrase.**

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Perform one of the following options:

If You Want To	Then
Add a section	Click **Add**. Select a section from the list. Click **OK**.
Remove a section	Click **Remove**. At the prompt, click **Yes**.
Move the section earlier in the list	Click **Move Up** one or more times as needed.

If You Want To	Then
Move the section later in the list	Click **Move Down** one or more times as needed.
Delete a section	Select the section. Click **Delete.** You cannot delete standard publications.

9. Review the publication type in the **Type** field.

The **Type** field is not configurable.

10. Enter a format name in the **Name** field.

11. Perform one of the following options:

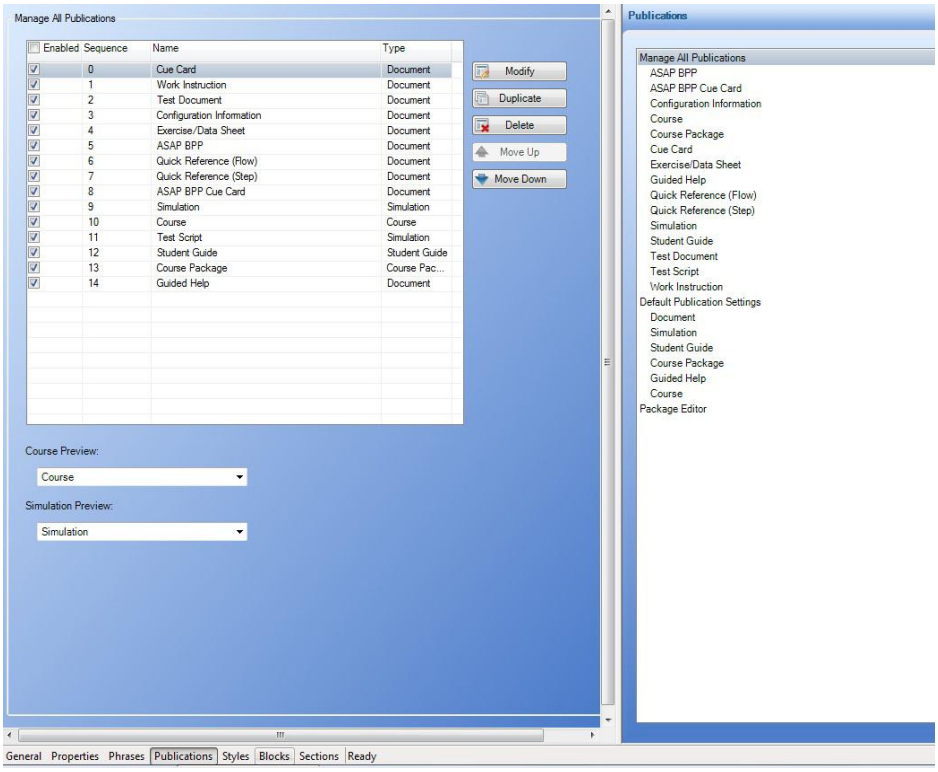
If You Want To	Then
Use default publication settings	Select the checkbox next to **Use Default Publication Settings**.
Create custom publication settings	Deselect the checkbox next to **Use Default Publication Settings**. Click a publication setting under the selected publication type. For more information, refer to Setting Default Publication Settings.

12. Select **FILE > SAVE** to save the template.

Duplicating, Deleting, and Moving Publication Types

1. From the editor, open the new template.

2. Click **Publications** on the status bar.



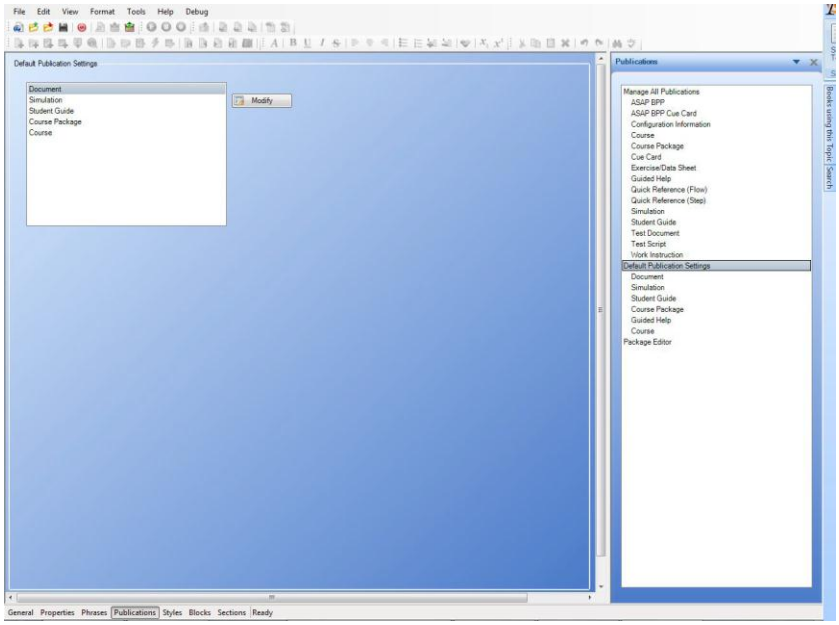
3. Choose from the following options:

If You Want To	Then
Copy a publication type	Select the publication type you want to copy, and click **Duplicate**.
Delete a publication type	Select the publication type you want to delete, and click **Delete**.
Move the publication type earlier in the list	Click **Move Up** one or more times as needed to determine where the publication type will display in the uPerform website drop-down list.
Move the publication type later in the list	Click **Move Down** one or more times as needed to determine where the publication type will display in the uPerform website drop-down list.

4. Select **FILE > SAVE** to save the template.

Setting Default Publication Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Click *Default Publication Settings* in the task pane.



4. Select one of the following options:

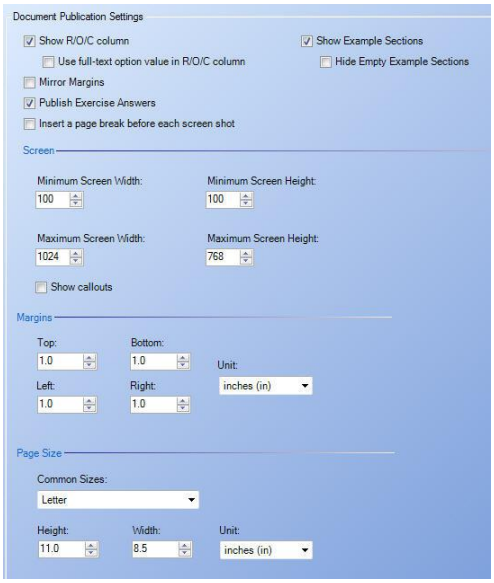
If You Want To	Then
Modify document publication settings	Select **Document** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Document (on page 235) for more information.
Modify simulation publication settings	Select **Simulation** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Simulation: General Settings (on page 237), Default Publication Settings: Simulation: User Interface Settings (on page 240), Default Publication Settings: Simulation: LMS Settings (on page 242), and Default Publication Settings: Simulation: Caption Settings (on page 243) for more information.
Modify student guide publication settings	Select **Student Guide** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Student Guide (on page 246) for more information.

If You Want To	Then
Modify guided help settings	Select **Guided Help** under *Default Publication Settings* in the task pane. Refer to Guided Help Settings: Guided Help General Settings (see "Default Publication Settings: Guided Help: General Settings" on page 247), refer to Guided Help Settings: User Interface Settings (see "Default Publication Settings: Guided Help: User Interface Settings" on page 249), refer to Guided Help Settings: Guided Help Captions (see "Default Publication Settings: Guided Help: Guided Help Captions" on page 251), refer to Guided Help Settings: Mobile Device Publication Settings (see "Default Publication Settings: Guided Help: Mobile Device Publication Settings" on page 252) for more information.
Modify course package settings	Select **Course Package** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Course Package for more information.
Modify course publication settings	Select **Course** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Course: General Settings (on page 253), Default Publication Settings: Course: User Interface Settings (on page 255), Default Publication Settings: Course: LMS Settings (on page 257), Default Publication Settings: Course: Caption Settings (on page 259), and Default Publication Settings: Course: Page Settings (on page 260) for more information.

Default Publication Settings: Document

1. From the editor, open the new template.
2. Click **Publications** on the status bar.

3. Select **Document** under *Default Publication Settings* in the task pane.



4. Complete/review the following fields:

Field	Description
Display the R/O/C column in published output	Select **Show R/O/C column** to display the R/O/C column in published output.
Use full-text option value in R/O/C column	Select **Use full-text option value in R/O/C column** to display Required, Optional, or Conditional in the document editor. **Show R/O/C column** must be selected in order to enable this option.
Show Example Sections	Select **Show Example Sections** to display the example sections.
Hide Empty Example Sections	Select **Hide Empty Example Sections** to hide empty example sections. **Show Example Sections** must be selected in order to enable this option.
Mirror Margins	Select **Mirror Margins** to create booklet-style, double-sided pages for PDF and Word outputs.
Publish Exercise Answers	Select **Publish Exercise Answers** to publish exercise answers.
Insert a page break before each screen shot	Select **Insert a page break before each screen shot** to insert a break before screen shots.
Screen	Select minimum and maximum screen heights and widths. Select **Show callouts** to display callouts. Callouts will only display in publications containing screen captures. The font, font size, and line thickness of the callout is not configurable.

Field	Description
Margins	Select the unit of measurement and specify the margins for the top, bottom, left, and right pages.
Page Size	Select common size, unit of measurement and specify the height and width.

5. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: General Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Simulation** under *Default Publication Settings* in the task pane.
4. Select **Simulation General Settings** from the drop-down list.
5. Complete the following fields:

Field	Description
Case-Sensitive	Select the **Case-Sensitive** checkbox to require the user to enter all text in the same case specified in the action properties (provided an Edit action of type 'Exact String' is used).
Require enter press	Select the **Require enter press** checkbox to require the user to press enter after an action.
Right click	Select the mouse and key combination to be used to represent a right-click action in the simulation.
Image Quality	Select a percentage from the drop-down list. The **Image Quality** option allows you to specify the compression quality of the image. ANCILE recommends the default 85%.
Bookmark	Select **Enabled**, **Disabled**, or **Mode Specific** from the drop-down list to select a display setting for bookmarks in the published output.
Mode Order	Use the **Move Up** and **Move Down** buttons to arrange the sequence of modes.

6. For Assessment mode, complete the following fields:

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Help Mode	Select from **Auto playback mode**, **Standard mode**, or **Self-Test mode**.
Note Display Delay	Select the wait time before notes are displayed.
Note Entry Animation	Select **Fade In** or **Display**.

7. For Auto playback mode, complete the following fields

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Playback Timer	Specify the default wait time between steps during auto playback.
Display mouse path	Select the **Display mouse path** checkbox to display mouse movements associated with each step of the simulation during auto playback.
Loop auto playback mode	Select this option to loop a simulation when viewed in auto-playback mode.
Display action notes	Select to display action notes.
Display action note tail	Select to display action note tail.
Display hotspots	Select to display hotspots.
Enable simulation typing sounds	Select the **Enable simulation typing sounds** checkbox, and select a sound from the drop-down list to enable typing sounds during simulation playback. For information on adding sound files to the template, refer to Specifying General Settings: Data Files (on page 219).
Default Action Display Delay	Specify the default wait time for action display.
Default Action Animation Delay	Select the default wait time for action animation.
Default Action Entry Animation	Select **Fade In** or **Display**.
Default Action Exit Animation	Select **Fade Out** or **Hide**.

8. For Self-Test mode, complete the following fields:

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Help Mode	Select from **Auto playback mode** or **Standard mode**.
Note Display Delay	Select the wait time for notes to display.
Note Entry Animation	Select **Fade In** or **Display**.

9. For Standard mode, complete the following fields:

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Display action notes	Select the **Display action notes** checkbox to enable the display and publishing of the auto-generated action notes in simulations.
Display action note tail	Select to display action note tail.
Display hotspots	Select to display hotspots.
Note Display Delay	Select the wait time for notes to display.
Note Entry Animation	Select **Fade In** or **Display**.

10. For Home Page, complete the following fields:

These options are set in the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 224).

Field	Description
Title	Select **Title** to display the title on the home page.
Author	Select **Author** to display the author on the home page.
Description	Select **Description** to display the description on the home page.
Copyright	Select **Copyright** to display the copyright on the home page.
Publish date	Select **Publish Date** to display the publish date on the home page.

11. For Step Window, complete the following fields:

Field	Description
Show step window	Select the **Show Step Window** checkbox to display the *Steps* window to users during simulation playback.
Height	Select the height of the published step window.
Width	Select the width of the published step window.
Dock on startup	Select **Dock on startup** checkbox to set the dock position on startup.
Dock Position	Select a dock position of right or left.

12. For Action Defaults, complete the following fields:

Field	Description
Border color	Select the color of the hotspot border. Optionally, specify custom colors by clicking **Select** to the right of the color drop-down list.
Border size	Select the size of the hotspot border.
Flashing	Select the checkbox next to **Flashing** to enable flashing hotspots.

13. Select **FILE > SAVE** to save the template.

For more information on simulation output modes, refer to "Viewing Simulations" in the companion manual, *Creating Content with ANCILE uPerform*.

Default Publication Settings: Simulation: User Interface Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Simulation** under *Default Publication Settings* in the task pane.

4. Select **Simulation User Interface Settings** from the drop-down list.

5. Select a skin from the **Skins** drop-down list.

A preview of the skin selection will display in the **Preview** window.

6. Complete the following fields:

Field	Description
Player Colors	Select a background color, and primary and secondary colors for the banner background from the drop-down list.
Text Colors	Select a primary color for the banner text from the drop-down list.

Optionally, specify custom colors by clicking **Select** to the right of the color drop-down list.

7. Choose from the following options:

Field	Description
Enable Transitions	Enables a smooth, animated transmission from step to step.
Reuse existing window	Uses the same window when an external link is launched from a simulation.
Hide audio bar when audio is not present	Hides the audio bar when audio is not present.
Do not resize	Opens the simulation in the current window size.
Resize and center window	Opens the simulation at the size specified by the screen width and height, and centers the simulation window.
Start in full screen mode	Opens the simulation in full screen mode.

8. Under **Screen**, select a minimum and maximum screen height and width.

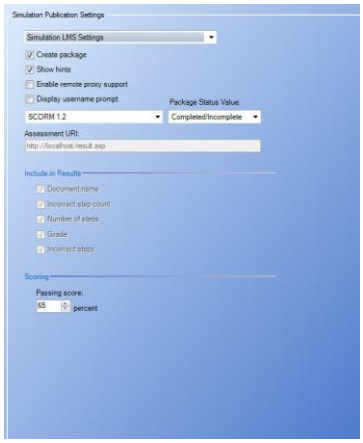
   This option is available only if **Resize and center window** is selected.

9. Under **Maximum Screen Size**, select a minimum or maximum screen size.

10. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: LMS Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Simulation** under *Default Publication Settings* in the task pane.
4. Select **Simulation LMS Settings** from the drop-down-list.



5. Complete/review the following fields:

Field	Description
Create package	Click the **Create Package** checkbox to create LMS-conformant output for integration with a Learning Management System (LMS).
Show hints	Select the **Show hints** checkbox to display hints during the simulation self test or assessment test. Hints are nonessential data (for example, a user name) required to complete the simulation.
Enable remote proxy support	Only select the **Enable remote proxy support** checkbox if you are instructed to do so by ANCILE Product Support.
Display username prompt	Select this option to display the username prompt on the home page.

Field	Description
Package Type	Select **SCORM 2004**, **SCORM 1.2**, or **AICC** from the drop-down list to select the output. You can edit the SCORM and AICC imsmanifest.xml file via the package editor. For more information, refer to Default Publication Settings: Package Editor (on page 263).
Package Status Value	Select a completion-type value from the drop-down list. This option is available only for SCORM 1.2 and AICC.
Assessment URI	Enter a destination URI (Uniform Resource Identifier) to send test results for capture by a custom-built utility instead of an LMS. You can create an Active Server Page (ASP) or Java Server Page (JSP) on a web server to receive the output for subsequent storage and reporting in a learning management system. Any technology that accepts the form Post method using HTTP can be used to handle the output. Example: http://www.yourcompany.com/results.asp Note that if the student's web browser security settings are set to High, warning messages will be displayed. The **Create Package** option must be disabled in order to enter a URI.

6. Complete/review the following fields:

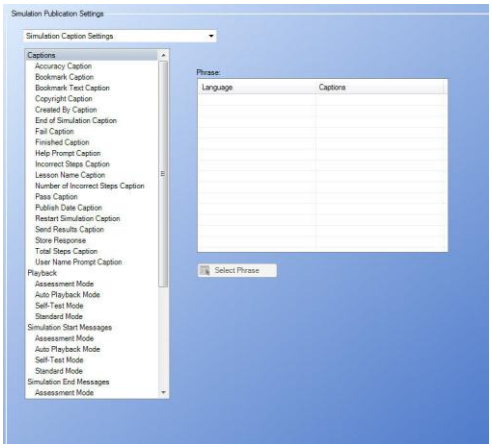
Field	Description
Include in results	Select the desired checkboxes to indicate the information to be captured when the simulation self test or assessment is completed.
Passing score	Specify the required passing score.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: Caption Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Simulation** under *Default Publication Settings* in the task pane.

4. Select **Simulation Caption Settings**.



5. Highlight a phrase in the phrase list.

6. Click **Select Phrase**.

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Select **FILE > SAVE** to save the template.

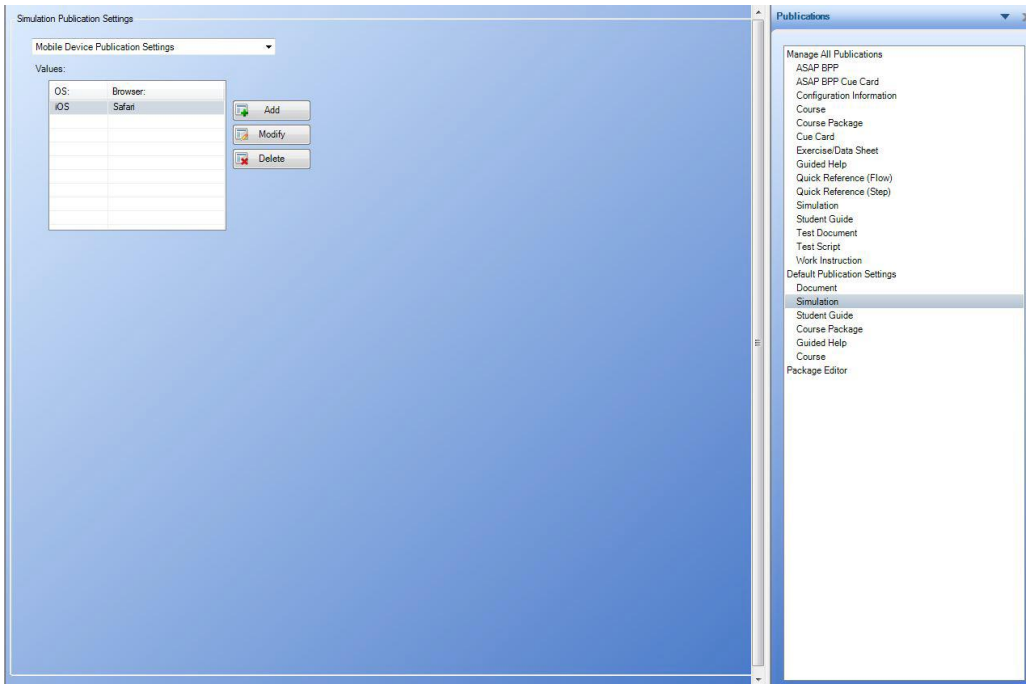
Default Publication Settings: Simulation: Mobile Device

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Simulation** under *Default Publication Settings* in the task pane.

4. Select **Mobile Device Publication Settings**.



5. Highlight an item in the Values list.

6. Perform one of the following options:

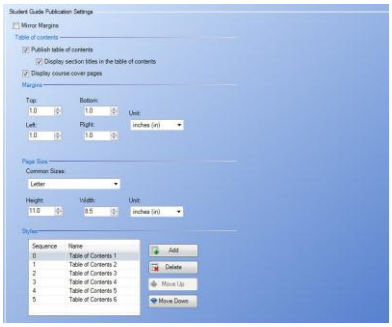
If You Want To	Then
Add a mobile device publication setting	Click **Add**. Enter Operating System. Enter Browser. Click **OK**.
Modify a mobile device publication setting	Click **Modify**. Enter Operating System. Enter Browser. Click **OK**.
Delete a mobile device publication setting	Click **Delete**. Click **Yes**.

The Operating System and Browser settings are detected during launch. At this time, there are no custom settings for each mobile device.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Student Guide

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Student Guide** under *Default Publication Settings* in the task pane.



4. Complete/review the following fields:

Field	Description
Mirror Margins	Select **Mirror Margins** to create booklet-style, double-sided pages for output.
Table of Contents	Select **Publish Table of Contents** to create a table of contents for output. Select **Display section titles in the table of contents** to display the section titles in inserted uPerform content in the published output. Select **Display course cover pages** to display the course cover page in published output.
Margins	Select the unit of measurement and specify the margins for the top, bottom, left, and right pages.
Page Size	Select size and unit of measurement.

5. Choose from the following options:

If You Want To	Then
Copy a style	Select the style you want to copy, and click **Add...**.
Delete a style	Select the style you want to delete, and click **Delete**.
Move the style earlier in the list	Click **Move Up** one or more times as needed to determine where the style will display in the table of contents.
Move the style later in the list	Click Move Down one or more times as needed to determine where the style will display in the table of contents.

6. Click **Select Phrase** to select a phrase for the player.

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Click **Select Phrase**.

9. Choose a phrase from the list.

10. Click **OK**.

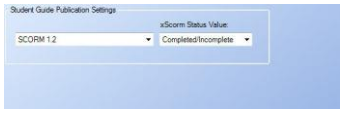
11. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course Package

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Course Package** under *Default Publication Settings* in the task pane.



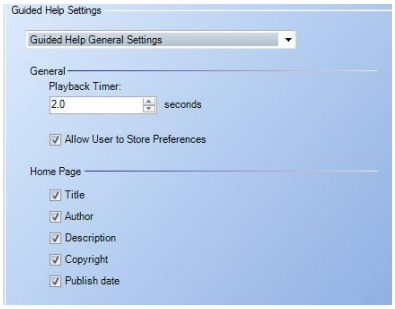
4. Select **SCORM 2004** or **SCORM 1.2** from the drop-down list to select the output.

5. If you are using SCORM 1.2, select a completion-type value from the drop-down list.

6. Select **FILE > SAVE** to save the template.

Default Publication Settings: Guided Help: General Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Selected **Guided Help** under *Default Publication Settings* in the task pane.



4. Select **Guided Help General Settings** from the drop-down list.
5. Complete the following fields:

Field	Description
Playback Timer	Select the up-down controls to set the default time in seconds that guided help displays for each page.
Allow User to Store Preferences	Select **Allow User to Store Preferences** checkbox to allow users to store preference settings for playback time, screen location of Guided Help, window size and window mode (maximize/minimize).

6. Complete the following fields:

These options are set in the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 224).

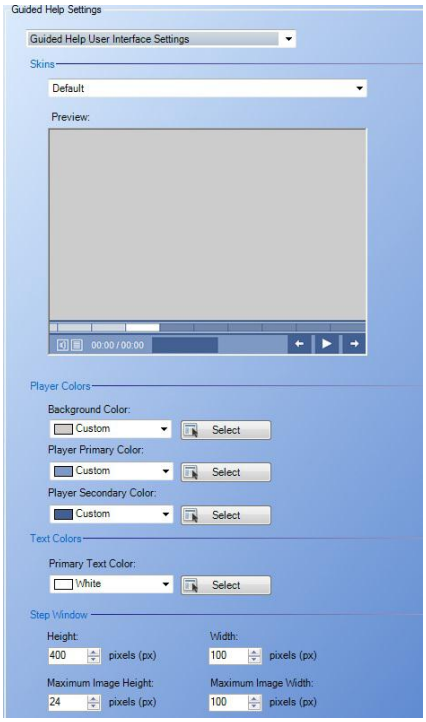
Field	Description
Title	Select **Title** to display the title on the home page.
Author	Select **Author** to display the author on the home page.
Description	Select **Description** to display the description on the home page.
Copyright	Select **Copyright** to display the copyright on the home page.
Publish date	Select **Publish Date** to display the publish date on the home page.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Guided Help: User Interface Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Guided Help** under *Default Publication Settings* in the task pane.

4. Select **Guided Help User Interface Settings** from the drop-down list.



5. Select a skin from the **Skins** drop-down list.

A preview of the skin selection will display in the **Preview** window.

6. Complete the following fields:

Field	Description
Player Colors	Select primary and secondary colors from the drop-down list.
Text Colors	Select primary and secondary, and link text colors from the drop-down list.

Optionally, specify custom colors by clicking **Select** to the right of list.

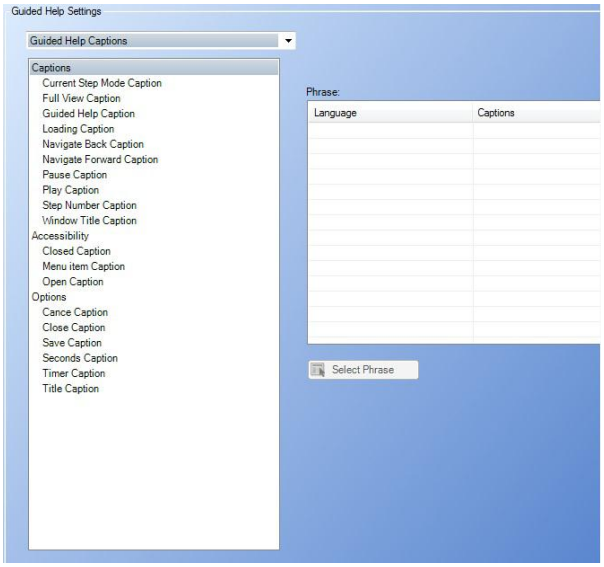
7. Select from the following options:

Field	Description
Step Window	Under **Step Window**, select a height and width, maximum image height and width, and screen position and whether to maximize on startup.
General	Enables a smooth, animated transmission from step to step. Also allows the help to always display on top of all other windows when running in Internet Explorer.

8. Select **FILE > SAVE** to save the template.

Default Publication Settings: Guided Help: Guided Help Captions

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Selected **Guided Help** under *Default Publication Settings* in the task pane.
4. Select **Guided Help Captions**.



5. Highlight a phrase in the phrase list.
6. Click **Select Phrase**.

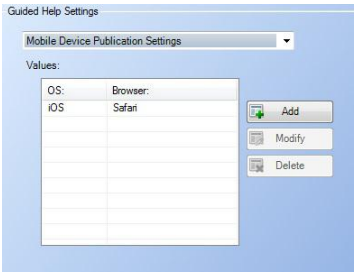
7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Select **FILE > SAVE** to save the template.

Default Publication Settings: Guided Help: Mobile Device Publication Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Selected **Guided Help** under *Default Publication Settings* in the task pane.
4. Select **Mobile Device Publication Settings** from the drop-down list.



5. Perform one of the following options:

If You Want To	Then
Add a new operating system/browser configuration	Click **Add**. Enter an operating system in the **Operating System** field. Enter the Browser type in the **Browser** field. Click **OK**.

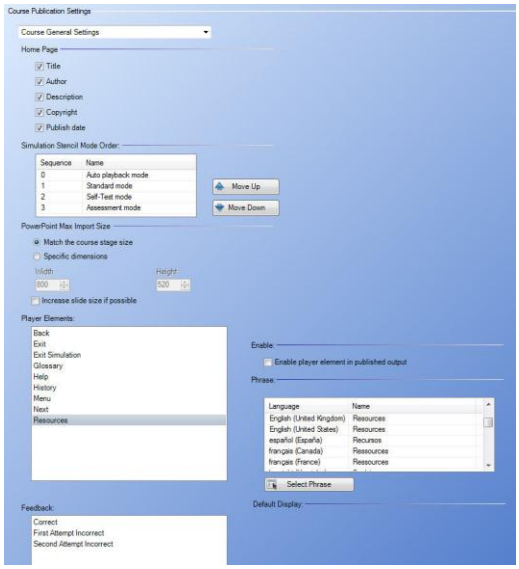
If You Want To	Then
Modify an existing operating system/browser configuration	Select an operating system/browser combination. Select **Modify**. Change operating system/browser setting as desired. Click **OK**.
Delete an existing operating system/browser configuration	Select an operating system/browser combination. Select **Delete**. Click **Yes**.

The Operating System and Browser settings are detected by Guided Help during launch. At this time, there are no custom settings for each mobile device.

6. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: General Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Course** under *Default Publication Settings* in the task pane.



4. Select **Course General Settings** from the drop-down list.

5. Complete the following fields:

These options are pulled from the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 224).

Field	Description
Title	Select **Title** to display the title on the home page.
Author	Select **Author** to display the author on the home page.
Description	Select **Description** to display the description on the home page.
Copyright	Select **Copyright** to display the copyright on the home page.
Publish date	Select **Publish Date** to display the publish date on the home page.
Simulation Stencil Mode Order	Use the **Move Up** and **Move Down** buttons to set the simulation stencil mode order.
Match the course stage size	Select **Match the course stage size** to display the course at the same size as the imported PowerPoint.
Specific dimensions	Select **Specific dimensions** to display the course in a specified width and height.
Increase slide size if possible	Select **Increase slide size if possible** to increase the size of the slides.

6. Choose from the following player elements:

Field	Description
Back	Enables the Back button in the published course.
Exit	Enables the Exit button in the published course.
Exit Simulation	Enables the Exit Simulation button in the embedded simulation in the published course.
Glossary	Enables the Glossary button in the published course.
Help	Enables the Help button in the published course.
History	Enables the History button in the published output.
Menu	Enables the Menu button in the published output.
Next	Enables the Next button in the published course.
Resources	Enables the Resources button in the published output.

7. Select the **Enable player element in published output** checkbox to enable the use of the selected element. Repeat this step for each player element.

8. Click **Select Phrase** to select a phrase for the player.

9. Perform one of the following phrases:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

10. Select one of the following feedback phrases:

Field	Description
Correct	Displays when the end user enters the correct answer.
First Attempt Incorrect	Displays when the end user enters an incorrect answer the first time.
Second Attempt Incorrect	Displays when the end user enters an incorrect answer the second time.

11. Enter a URL in the URL field.

Based on the player element selected, this option may not display.

12. Select the **Enabled** checkbox next to the video format extension to enable the video format in published output.

13. Select a video format and click **Add**, **Modify**, or **Delete** to make changes to the available video formats.

14. Select **FILE > SAVE** to save the template.

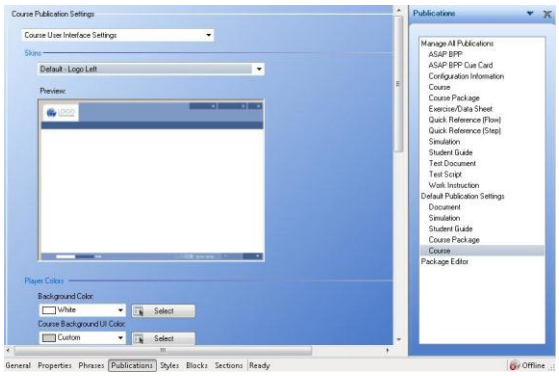
Default Publication Settings: Course: User Interface Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Course** under *Default Publication Settings* in the task pane.

4. Select **Course User Interface Settings** from the drop-down list.



5. Select a skin from the **Skins** drop-down list.

A preview of the skin selection will display in the **Preview** window.

6. Complete the following fields:

Field	Description
Player Colors	Select a background color, course background user interface color, and player primary and secondary colors from the drop-down list. These colors will display in the published course output.
Text Colors	Select primary and secondary, and link text colors from the drop-down list. These colors will display in the published course output.

Optionally, specify custom colors by clicking **Select** to the right of list.

7. Select from the following options:

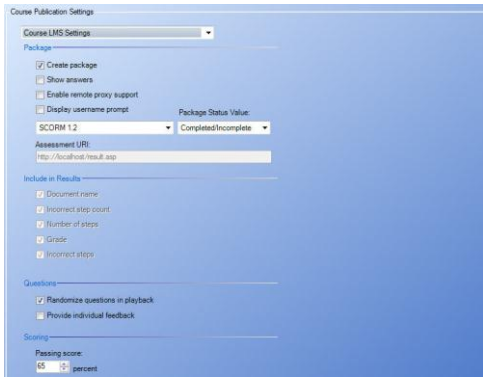
Field	Description
Enable Transitions	Enables a smooth, animated transition from slide to slide.
Reuse existing window	Uses the same window when an external link is launched from the course.
Hide audio bar when audio is not present	Hides the audio bar when audio is not present.
Only display one popup at a time	If selected, only one popup is displayed at any one time.
Allow user to give up and fail assessment simulations	Allows the user to quit and fail an assessment.
Base progress on current location	Shows percent complete based on where the user is in the course.
Base progress on percentage done	Shows percent complete based on how much of the course a user has completed.

Field	Description
Allow Image Zooming	Specifies if image zooming is allowed and if it is the default setting.
Do not resize	Opens the course in the current window size.
Resize and center window	Opens the course at the size specified by the screen width and height, and centers the course window.
Start in full screen mode	Opens the course in full screen mode.
Screen	Choose the width and height for the course display. **Resize and center window** must be enabled.
Width/Height	Specifies the size of the course page content within the browser window.
Logo	Select a logo to display in the published course and on the website. Logos are managed in the Image area of the template editor. For more information on images, refer to Specifying General Settings: Images (on page 218).
Hotspot Interaction	Select a stamp to indicate a hotspot in a course. Select a color for the hotspot.

8. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: LMS Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Course** under *Default Publication Settings* in the task pane.
4. Select **Course LMS Settings** from the drop-down list.



5. Complete the following fields:

Field	Description
Create package	Click the **Create Package** checkbox to create SCORM-conformant or AICC-conformant output for integration with a Learning Management System (LMS).
Show answers	Click the **Show Answers** button to display the answer at the end of the course.
Enable remote proxy support	Only select the **Enable Remote Proxy Support** checkbox if you are instructed to do so by ANCILE Product Support.
Display username prompt	Select this option to display the username prompt on the home page.
LMS Package Type	Select **SCORM 2004**, **SCORM 1.2**, or **AICC** from the drop-down list to select the output. For more information on packages, refer to Default Publication Settings: Package Editor (on page 263).
Package status value	Select a completion-type value from the drop-down list. This option is available only for SCORM 1.2 and AICC.
Assessment URI	Enter a destination URI (Uniform Resource Identifier) to send test results for capture by a custom-built utility instead of an LMS. You can create an Active Server Page (ASP) or Java Server Page (JSP) on a web server to receive the output for subsequent storage and reporting in a learning management system. Any technology that accepts the form Post method using HTTP can be used to handle the output. Example: http://www.yourcompany.com/results.asp Note that if the student's web browser security settings are set to High, warning messages will be displayed. The **Create Package** option must be disabled in order to enter a URI.

6. Complete the following fields:

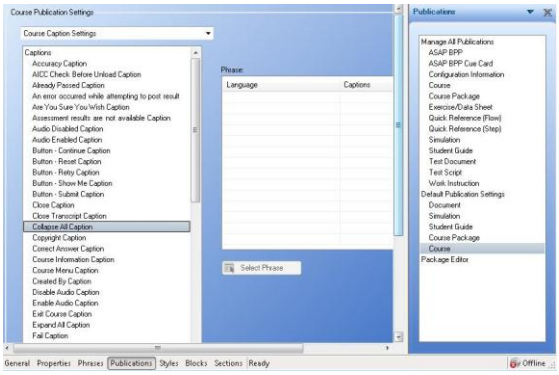
Field	Description
Include in results	Select the desired checkboxes to indicate the information to be captured when the course assessment is completed.
Randomize questions in playback	Select this option to randomize the order of assessment pages.
Provide individual feedback	Select this option to provide feedback on individual assessment questions.
Passing score	Specify the required passing score.

Field	Description
Users may retake	**No questions**: Users may not retake any questions. **Incorrect questions**: Users may retake only those questions that were answered incorrectly. **All questions**: Users may retake all questions.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: Caption Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Course** under *Default Publication Settings* in the task pane.
4. Select **Course Caption Settings** from the drop-down list.



5. Highlight a phrase in the phrase listbox.
6. Click **Select Phrase**.
7. Perform one of the following options:

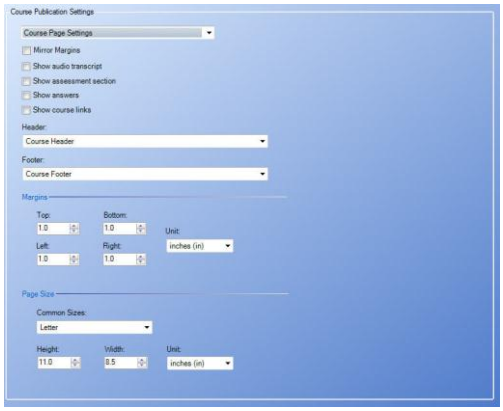
If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.

If You Want To	Then
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: Page Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Course** under *Default Publication Settings* in the task pane.
4. Select **Course Page Settings** from the drop-down list.



5. Complete the following fields:

Field	Description
Mirror Margins	Select **Mirror Margins** to create booklet-style, double-sided pages for PDF and Word publication.
Show audio transcript	Select **Show audio transcript** to display the audio transcript in published courses.
Show assessment section	Select **Show assessment section** to display the assessment section in a published course.
Show answers	Select **Show answers** to display assessment answers.
Show course links	Select **Show course links** to display links when you publish a course to Word or PDF format.

6. Complete the following fields:

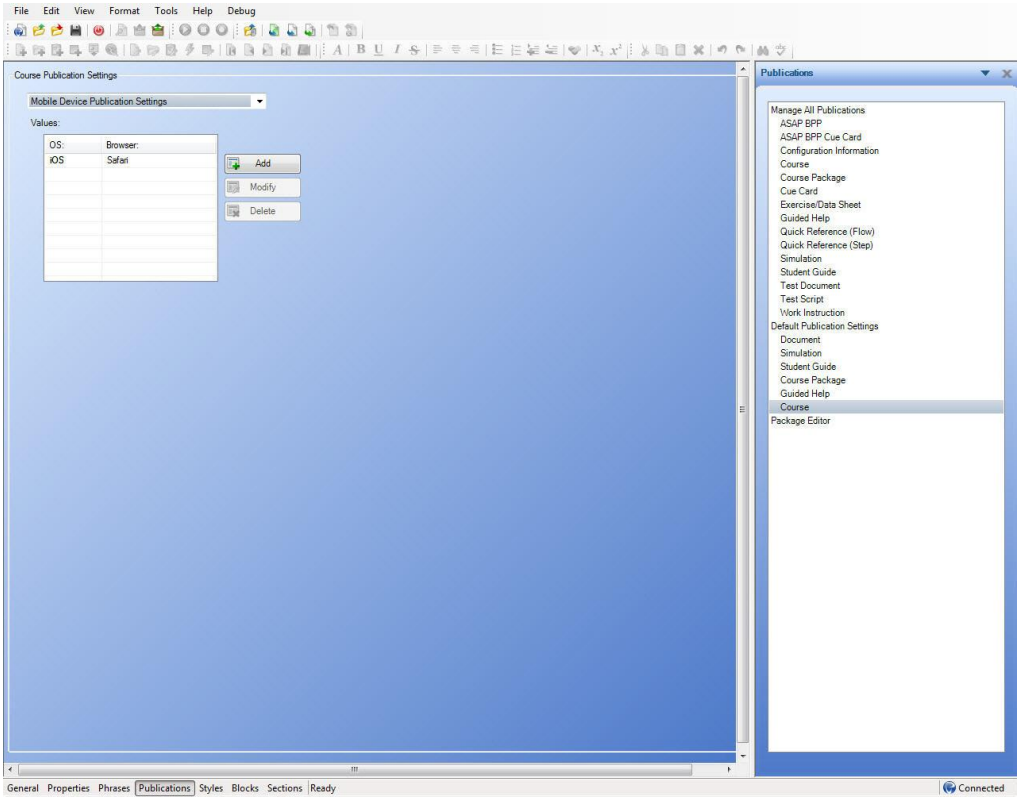
Field	Description
Header	Select **Course Header**, **Student Guide Header**, **Header**, **Course Footer**, **Student Guide Footer**, or **Footer** from the drop-down list to select the header.
Footer	Select **Course Footer**, **Student Guide Footer**, **Footer**, **Course Header**, **Student Guide Header**, or **Header** from the drop-down list to select the footer.
Margins	Specify margins for **Top**, **Bottom**, **Left**, and **Right**. Optionally, select the unit of measurement from the **Unit** drop-down box.
Page Size	Specify the common sizes, height, width, and unit of measurement.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: Mobile Device Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Selected **Course** under *Default Publication Settings* in the task pane.

4. Select **Mobile Device Publication Settings** from the drop-down list.



5. Perform one of the following options:

If You Want To	Then
Add a new operating system/browser configuration	Click **Add**. Enter an operating system in the **Operating System** field. Enter the Browser type in the **Browser** field. Click **OK**.
Modify an existing operating system/browser configuration	Select an operating system/browser combination. Select **Modify**. Change operating system/browser setting as desired. Click **OK**.
Delete an existing operating system/browser configuration	Select an operating system/browser combination. Select **Delete**. Click **Yes**.

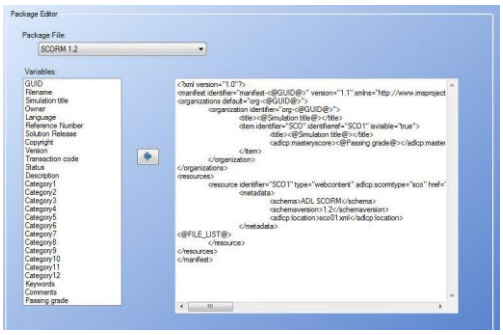
The Operating System and Browser pairs are detected during launch. At this time, there are no custom settings for each mobile device.

6. Select **FILE > SAVE** to save the template.

Default Publication Settings: Package Editor

You can edit the SCORM and AICC imsmanifest.xml file via the package editor.

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Package Editor** in the task pane.



4. Select the package file type from the **Package File** drop down list.
5. In the code box, insert the cursor where you want to insert a variable.
6. Select the variable(s) to be included from the **Variables** list.
7. Click the right arrow to add the variable(s) to the package file.
8. Edit the file as desired.
9. Repeat Steps 5 through 8 for each element you want to add.
10. Select **FILE > SAVE** to save the template.

ANCILE supports the following elements from the SCORM/AICC specifications:

Package File	Supported Data Elements
SCORM 1.2	Lesson Status (cmi.core.lesson_status) Lesson Location (cmi.core.lesson_location) Suspend Data (cmi.suspend_data) Raw Score (cmi.core.score.raw) Min Score (cmi.core.score.min) Max Score (cmi.core.score.max) Session Time (cmi.core.session_time) Interactions (cmi.interactions)

Package File	Supported Data Elements
	Interaction ID (cmi.interactions.n.id) Interaction Time (cmi.interactions.n.time) Interaction Type (cmi.interactions.n.type) Interaction Correct Response (cmi.interactions.n.correct_responses.n.pattern) Interaction Student Response (cmi.interactions.n.student_response) Interaction Result (cmi.interactions.n.result) *Interaction Description (rwd.interactions.n.description)
SCORM 2004	Completion Status (cmi.completion_status) Success Status (cmi.success_status) Lesson Location (cmi.location) Suspend Data (cmi.suspend_data) Raw Score (cmi.score.raw) Min Score (cmi.score.min) Max Score (cmi.score.max) Scaled Score (cmi.score.scaled) Session Time (cmi.session_time) Interactions (cmi.interactions) Interaction ID (cmi.interactions.n.id) Interaction Type (cmi.interactions.n.type) Interaction Correct Response (cmi.interactions.n.correct_responses.n.pattern) Interaction Student Response (cmi.interactions.n.student_response) Interaction Result (cmi.interactions.n.result) Interaction Description (cmi.interactions.n.description)
AICC	Lesson Location (Core.Lesson_Status) Lesson Status (Core.Lesson_Location) Suspend Data (Core_Lesson) Raw Score (Core.Score) Session Time (Core.Time)

The following table explains the Data Elements:

Data Element	Explanation
Lesson Status	Element utilized to specify the completion status of the SCO (completed/incomplete). This element can also be utilized to specify the mastery/success of the SCO (passed/failed).
Completion Status	Element utilized to specify the completion status of the SCO (completed/incomplete).
Success Status	The element utilized to specify the mastery of the

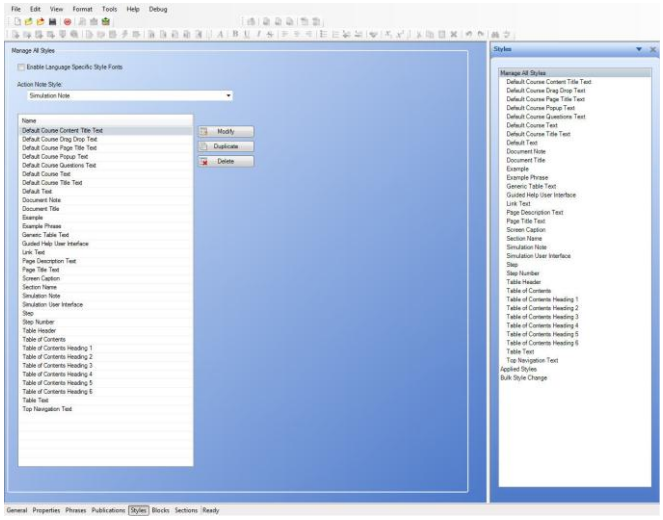
Data Element	Explanation
	SCO (passed/failed).
Lesson Location	The element used to specify the step/page at which the learner terminated the SCO. Also referred to as the SCO bookmark.
Suspend Data	The element utilized to persist content-specific information, such as the pages/steps the learner has viewed within the SCO. This element is primarily utilized by uPerform courses.
Raw Score (0-100)	The element utilized for specifying the score achieved by the learner within the SCO. The value is based on the performance within the assessment mode of a simulation, or within either an assessment or terminated branch, with scoring enabled, inserted into a course.
Min Score	The minimum score a learner can achieve within a lesson. This value is currently always set to a value of "0" (zero) within published uPerform content.
Max Score	The maximum score a learner can achieve within a lesson. This value is currently always set to a value of "100" within published uPerform content.
Scaled Score (0-10)	The element utilized to specify the performance of a learner within the SCO that is scaled to fit with the range of 0 – 1.0. The value is based on the performance within the assessment mode of a simulation, or within either an assessment or terminated branch, with scoring enabled, inserted into a course.
Session Time	The time the learner has spent in the lesson during a given session.
Interactions	The data related to the questions/steps within an assessment. The value is based on the performance within the assessment mode of a simulation, or an assessment inserted into a course. **Interaction ID** - The unique identifier of the interaction. **Interaction Time** - A timestamp at which the interaction was completed. **Interaction Type** - The type of the interaction. **Interaction Correct Response** - The correct answer for the interaction. **Interaction Student Response** - The learner's response to the interaction. **Interaction Result** - The success outcome (correct or incorrect/wrong) **Interaction Description** - The description of the

Data Element	Explanation
	interaction, utilized to persist the question stem in uPerform. In the case of SCORM 1.2, this is a custom data model element that is utilized by ANCILE uLearn.

Specifying New Template Settings: Styles

Specifying Styles

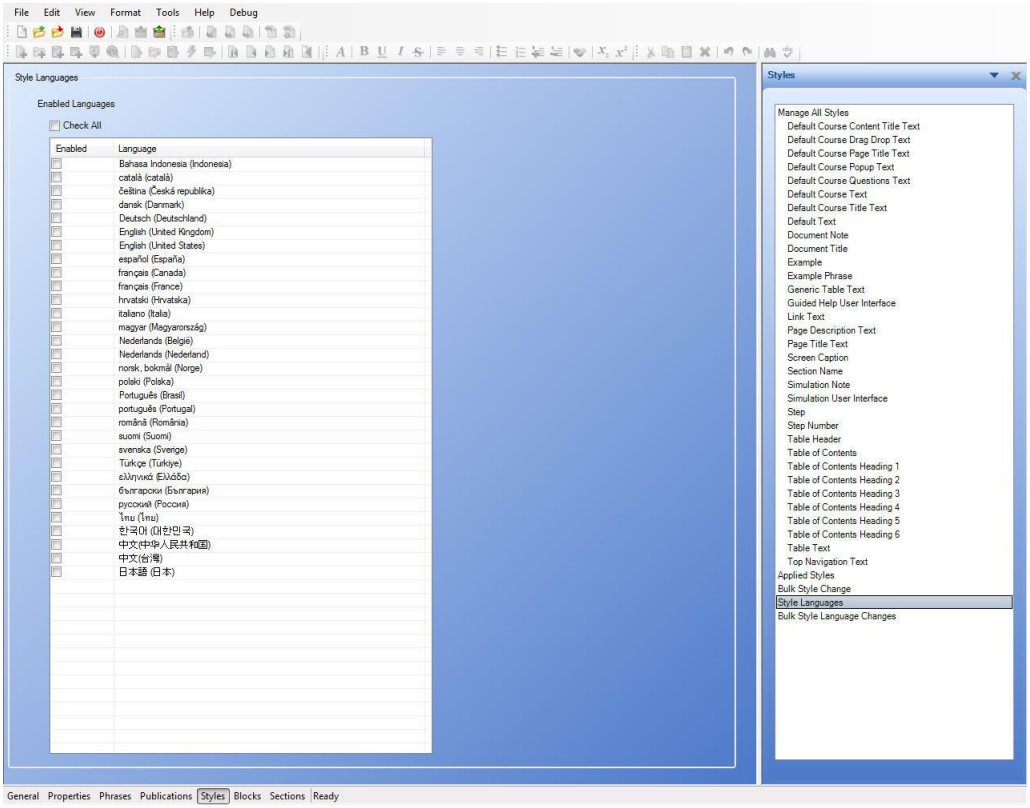
1. From the editor, open the new template.
2. Click **Styles** on the status bar.



3. Perform one of the following options:

If You Want To	Then
Enable the use of language-specific fonts	Select **Enable Language Specific Style Fonts**, and go to Step 4.
Disable the use of language-specific fonts	Deselect **Enable Language Specific Style Fonts**, and go to Step 7.

4. Select **Style Languages** from the task pane.



5. Perform one of the following options:

If You Want To	Then
Manually select style languages to be enabled in this template	Select or deselect one or more checkboxes in the **Enabled** column.
Select all languages to be used in this template.	Select **Check All**.

6. Select **Manage All Styles** from the task pane.

7. Click on the drop-down list below **Action Note Style**.

8. Select one of the following styles from the task pane:

Field	Description
Default Course Content Title Text	The style to be used for the text displayed in the content title area of a course.
Default Course Drag Drop Text	The style to be used for the text displayed for drag and drop in a course.
Default Course Page Title Text	The style to be used for the text displayed as the page title in a course.
Default Course Popup Text	The style to be used for the text displayed as a popup in a course.

Field	Description
Default Course Questions Text	The style to be used for the text displayed as assessment questions in a course.
Default Course Text	The style to be used for the course text.
Default Course Title Text	The style to be used for the text displayed as the course title.
Default Text	The style to be used for the page text.
Document Note	The style to be used for the document note.
Document Title	The style to be used for the document title that displays at the top of a document.
Example	The style to be used for the example text.
Example Phrase	The style to be used for the example phrase text.
Generic Table Text	The style to be used for generic table text.
Guided Help User Interface	The style to be used for the text displayed in a guided help user interface.
Link Text	The style to be used for the link text.
Page Description Text	The style to be used for the page description text.
Page Title Text	The style to be used for the page title text.
Screen Caption	The style to be used for the captions displayed above screen captures in a document.
Section Name	The style to be used for sections displayed in your document.
Simulation Note	The style to be used for simulation notes.
Simulation User Interface	The style to be used for simulation user interface.
Step	The style to be used for step text.
Step Number	The style to be used for the step number.
Table Header	The style to be used for the table header.
Table of Contents	The style to be used for table of contents heading
Table of Contents Heading 1-6	The style to be used for the levels within the table of contents.
Table Text	The style to be used for the table text.
Top Navigation Text	The style to be used for the top navigation text displayed in a uPerform course.

9. Click **Modify**.

10. Click **Select Phrase**.

11. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

12. Complete the following fields:

Depending on the style selected, some of the following options may not be displayed.

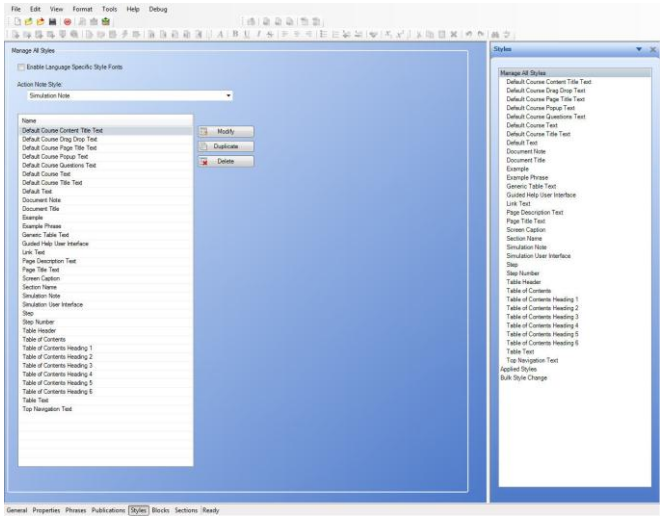
Field	Description
Font	Click **Select** to choose a font
Size	Specify the font size.
Font Color	Select a font color from the drop-down list. Optionally, click **Select** to create a custom color.
Effects	Click the checkbox(es) next to **Bold**, **Underline**, **Italic**, or **Strikethrough**, to apply rich text formatting.
Use Language Specific Fonts	Click the checkbox next to **Use Language Specific Fonts** and click **Select** to choose the language specific font(s).
Justification	Specify a justification setting from the drop-down list.
Margins	Specify margins for **Top**, **Bottom**, **Left**, and **Right**. Optionally, select the unit of measurement from the **Unit** drop-down box.
First Line	Specify the indent of the first line. Optionally, select the unit of measurement from the **Unit** drop-down box.
Background Color	Specify a background color from the drop-down list. Optionally, click **Select** to create a custom color.
Gradient	Select the **Gradient** checkbox to apply a gradient to section header backgrounds in HMTL outputs viewable in supported versions of Internet Explorer.

Field	Description
Start Color	Specify a gradient start color from the drop-down list. Optionally, click **Select** to create a custom color.
End Color	Specify a gradient end color from the drop-down list. Optionally, click **Select** to create a custom color.
Orientation	Specify the orientation of the gradient from the drop-down list.
Border Color	Specify a border color from the drop-down list. Optionally, click **Select** to create a custom color.
Border Size	Specify the border width from the drop-down list.
Apply to Bottom Border Only - HTML Only	Specify the style be applied only to the bottom border.

13. Select **FILE > SAVE** to save the template.

Modifying, Duplicating, and Deleting Styles

1. From the editor, open the new template.
2. Click **Styles** on the status bar.
3. Click *Manage All Styles* from the task pane.



4. Select a style from the editor pane.

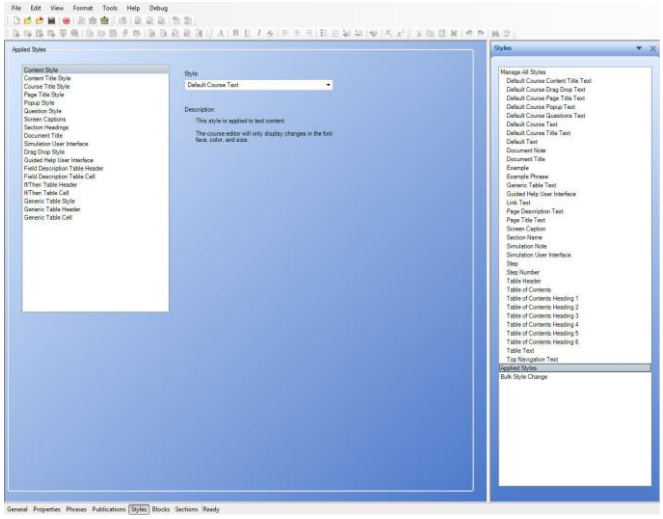
5. Choose from one of the following options:

If You Want To	Then
Modify the selected style	Click **Modify**, and refer to Specifying Styles (on page 266).
Duplicate the style	Click **Duplicate**. The duplicated style is added below the original style. Modify the property to specify a new name and characteristics. For more information, refer to Specifying Styles (on page 266).
Delete the selected style	Click **Delete**. At the prompt, click **Yes**.

6. Click **FILE > SAVE** to save the template.

Viewing Styles

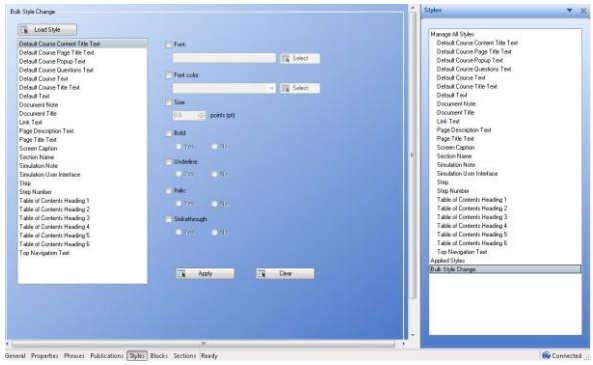
1. From the editor, open the new template.
2. Click **Styles** on the status bar.
3. Click *Applied Styles* from the task pane.



A list of styles and their descriptions is displayed in the *Editor Pane*.

Changing Bulk Styles

1. From the editor, open the new template.
2. Click **Styles** on the status bar.
3. Click *Bulk Style Change* from the task pane.



4. Select a style from the list.
5. Click **Load Style** to view the current style settings for the item selected.
6. Using the Ctrl or Shift key, select one or more styles for which you want to apply a bulk change.
7. Complete the following fields:

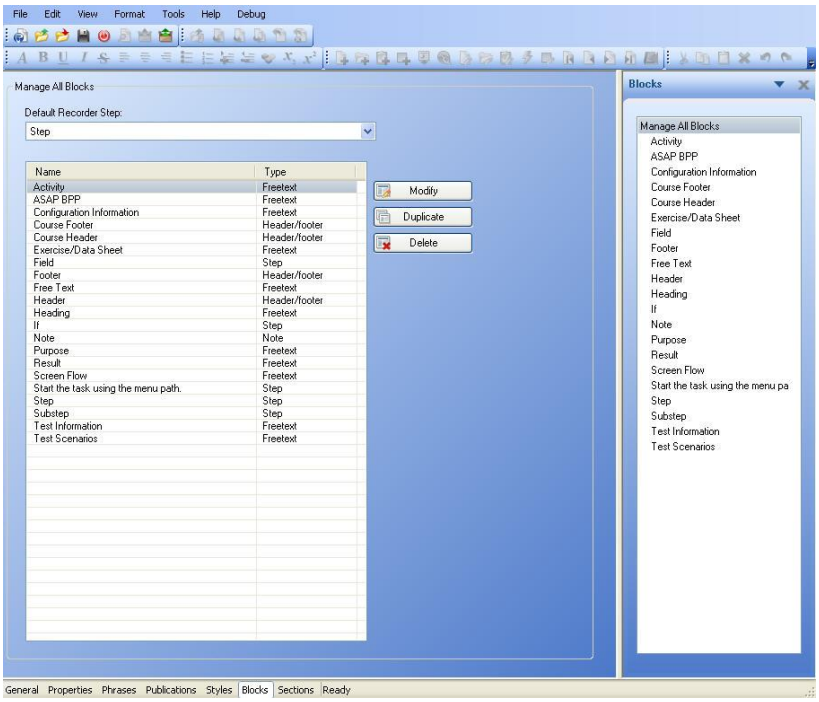
Field	Description
Font	Select the checkbox next to **Font** to specify a font.
Font Color	Select the checkbox next to **Font Color** to specify a font color.
Size	Select the checkbox next to **Size** to specify a font size.
Bold	Select the checkbox next to **Bold**, and select **Yes** or **No** to specify a bold font.
Underline	Select the checkbox next to **Underline**, and select **Yes** or **No** to specify an underline font.
Italic	Select the checkbox next to **Italic**, and select **Yes** or **No** to specify an italic font.
Strikethrough	Select the checkbox next to **Strikethrough**, and select **Yes** or **No** to specify a strikethrough font.

8. Click **Apply**.
9. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Blocks

Specifying Blocks

1. From the editor, open the new template.
2. Click **Blocks** on the status bar.



3. Perform one of the following options:

If You Want To	Then
Modify a block	Go to Step 5.
Duplicate a block	Select the block from the content area, and click **Duplicate**.
Delete a block	Select the block from the content area, and click **Delete**. At the prompt, click **Yes**.

4. Optionally, select a step type from the **Default Recorder Step** drop-down list.
5. Select one of the following blocks from the task pane:

Field	Description
Activity	The block that contains the task information.

Field	Description
ASAP BPP	The block that contains the business process description overview, input, output, comments, and tips and tricks.
Configuration Information	The block that contains the configuration information for the document.
Course Footer	The block that contains the course footer information.
Course Header	The block that contains the course header information.
Exercise/Data Sheet	The block that contains information relevant to the end user's task.
Field	The block that contains the Field/Description table.
Footer	The block that contains the footer information.
Free Text	The block that contains the boilerplate freetext.
Header	The block that contains the header information.
Heading	The block that contains the heading boilerplate text.
If	The block that contains the If/Then table.
Note	The block that contains the note boilerplate text.
Purpose	The block that contains the trigger, prerequisites, menu path, transaction code, and helpful hints.
Result	The block that contains the percent complete.
Screen Flow	The block that contains the screen flow image file.
Start the task using the menu path	The block the contains the start transaction text.
Step	The block that contains the step boilerplate text.
Student Guide Footer	The block that contains the student guide footer information.
Student Guide Header	The block that contains the student guide header information.
Substep	The block that contains the substep boilerplate text.
Test Information	The block that contains the test history and scenarios.
Test Scenarios	The block that contains the table specific to test scenarios.

6. Click **Modify**.

7. Click **Select Phrase**.

8. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

9. In the **Content** area, modify the text within the curly braces.

10. Perform one or more of the following options:

If You Want To	Then
Modify the format of displayed block text	Highlight the text to be formatted. Click **Format...**, and select from the **Edit**, **Format**, or **Justify** options.
Insert an image, table, weblink, or line at the cursor location in the displayed block text	Click **Format...**, and select from the **Table** or **Insert** options.
Insert a phrase or standard document property code at the cursor location in the displayed block text	Click **INSERT... > PHRASE...** [or] **Standard Code...**, and select from the displayed list.
Determine where the block is used	View the **This item is used by the items below** area.

11. Optionally, edit the source content of the block in the **Source** pane.

Basic knowledge of HTML, XML, and Java is required.

12. Under **Format**, select a style from the drop-down list.

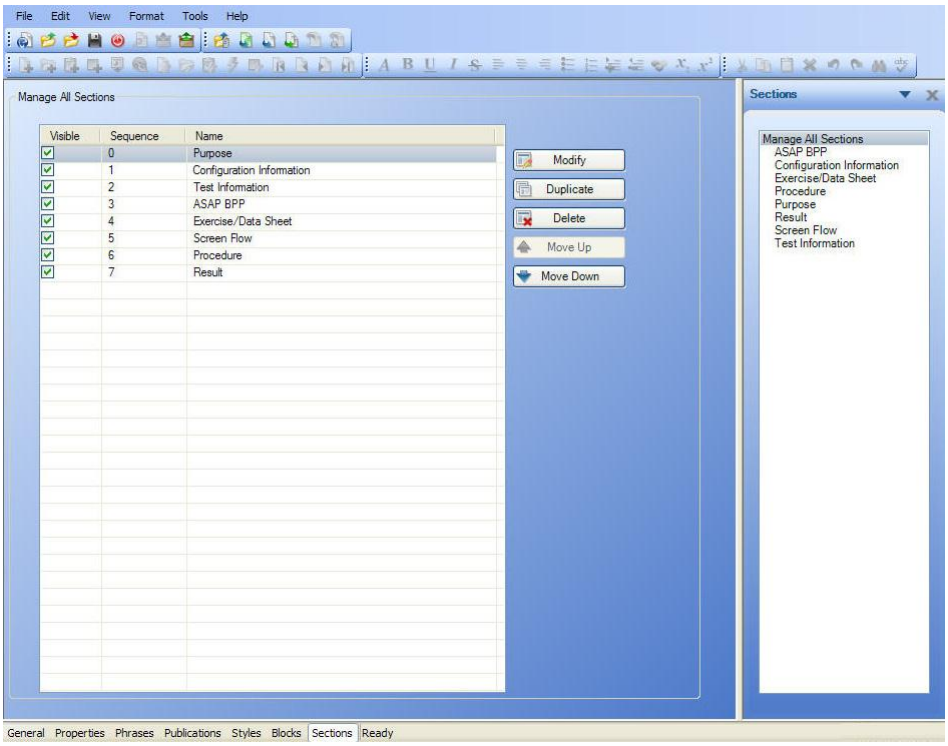
13. Click the checkbox next to **Visible** to display the block in published documentation.

14. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Sections

Specifying Sections

1. From the editor, open the new template.
2. Click **Sections** on the status bar.



3. Select a section from the *Task Pane*.
4. Click the checkbox next to **Visible** to display the section in published documentation.

   New sections will display in all new documents and older documents will be upgraded to add newly added sections when opened.

5. Complete the following fields:

Field	Description
Header	Specify the header for the section.
Footer	Specify the footer for the section.

6. Click **Select Phrase**.

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Under **Content**, perform one of the following options:

If You Want To	Then
Add content to the section	Click **Add**. Select a block from the list. Click **OK**.
Remove content	Click **Remove**. At the prompt, click **Yes**.
Move content to earlier in the list	Click **Move Up** one or more times as needed.
Move content to later in the list	Click **Move Down** one or more times as needed.

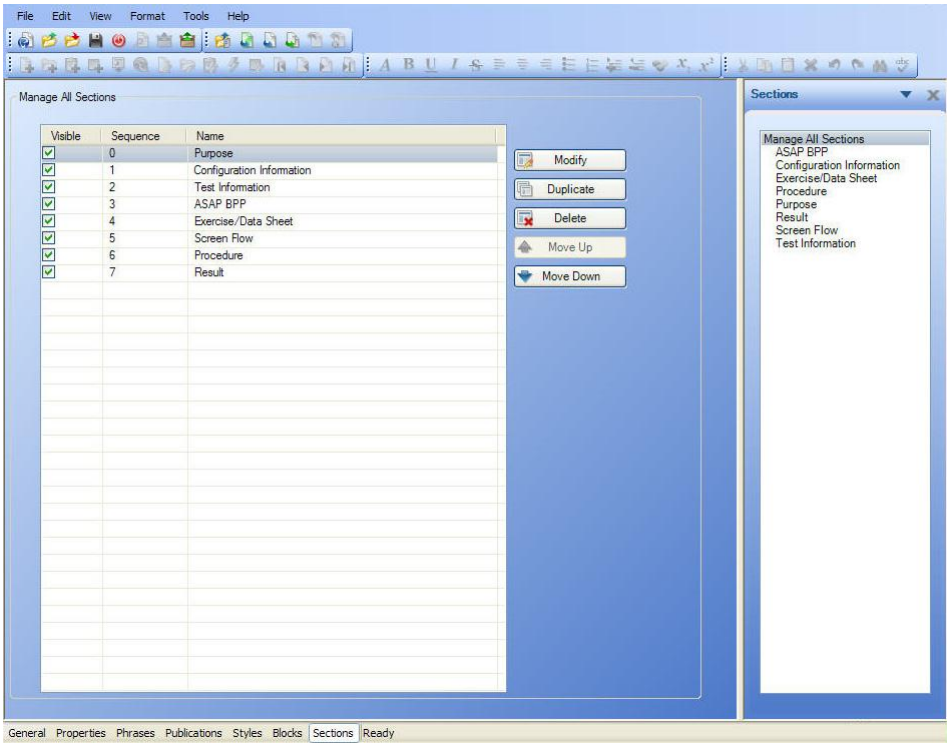
9. Determine where the section is used in the **This item is used by the items below** area.

10. Click **FILE > SAVE** to specify additional sections.

Modifying, Duplicating, and Deleting Sections

1. From the editor, open the new template.

2. Click **Sections** on the status bar.



3. Perform one of the following options:

If You Want To	Then
Modify a section	Select the section from the *Manage All Sections* list in the content pane. Click **Modify**. For information on modifying a section, refer to Specifying Sections (on page 276).
Duplicate a section	Select the section from the content area, and click **Duplicate**. The duplicated section is added below the original section. Modify the property to specify a new name and characteristics. For information, refer to Specifying Sections (on page 276).
Delete a section	Select the section from the content area, and click **Delete**. At the prompt, click **Yes**.

If You Want To	Then
Move a section earlier in the list	Select the section. Click **Move Up** one or more times as needed.
Move the section later in the list	Select the section. Click **Move Down** one or more times as needed.

4. Click **FILE > SAVE** to save the template.

Export and Import an Author Template

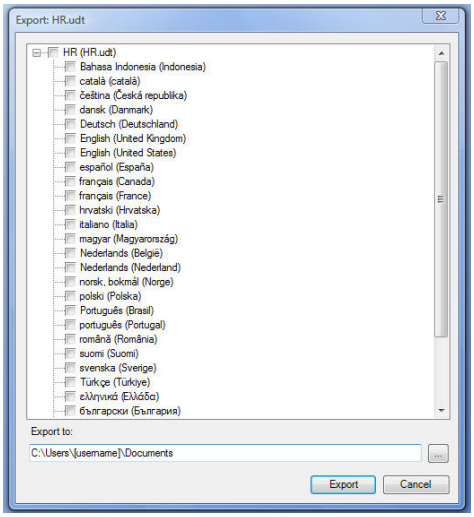
ANCILE uPerform allows users to import and export author template phrases via the XML Localization Interchange File Format (XLIFF) for translating template content in to multiple languages. When a template is exported, one XLIFF file will be created for each language. When a template is imported, it is updated to contain the translated phrases.

The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.

The XLIFF file can be edited in Notepad, in an HTML editor, or via a specialized XLIFF editor such as Xliff Editor or Heartsome.

Exporting Template Content

1. Select **FILE> MANAGE CONTENT LANGUAGE**.
2. Select **Export [template name]**.



3. Select the target export language(s).

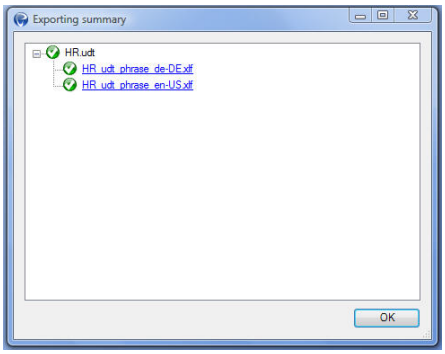
   Multiple languages can be selected. Click the checkbox beside the template name to select all languages.

4. Click **Export**.

5. Optionally, select , to specify a destination folder other than the default.

   Only the template will be exported. Any depending uPerform content will not be represented in the output.

6. Click **Export**.

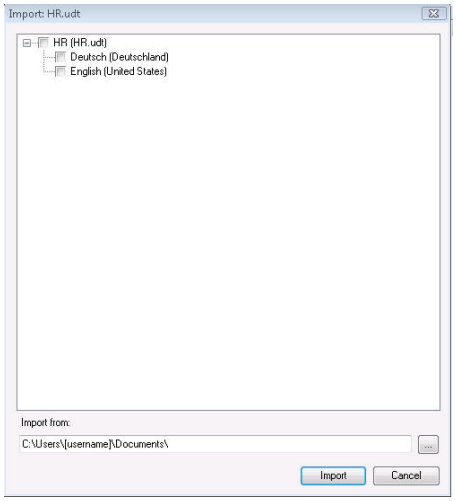


7. Click **OK**.

Importing Template Content

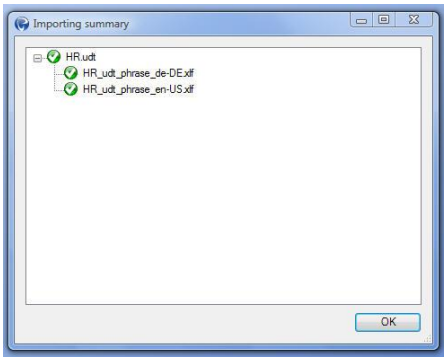
1. Select **FILE> MANAGE CONTENT LANGUAGE**.

2. Select **Import [template name]**.



3. Select the template and language(s) to import.

4. Click **Import**.



5. Click **OK**.

The template is now updated to include the translated phrases, and will be included in content using that template.

Delete an Author Template

Create a backup of the template file prior to deleting the template. Any existing documents created with the deleted template cannot be opened after the template is deleted.

Deleting an Author Template

1. Select **FILE > MANAGE LOCAL TEMPLATES**.
2. Select the template you want to delete.
3. Click **Remove**.
4. Click **OK**.

Chapter 12: Using Custom Skins and Modifying CSS Files

ANCILE uPerform allows you to manage custom skins for courses, simulations, and guided help publications. You can deploy custom skins with the uPerform client or server to allow multiple authors the ability to share and use the custom skins. uPerform allows you to modify CSS files to incorporate your corporate standards and preferences.

Introduction to Custom Skin Management

Custom skin management simplifies the deployment of custom skins to multiple authors from the uPerform client and server. Custom skins associated with courses, simulations, and guided help can be imported from a local computer to uPerform, exported from uPerform to a local computer, and checked in to the server.

Only System and Project Administrators can check in custom skins.

Creating Skins

Creating Skins

If you do not want to leverage a standard skin delivered with uPerform, you can create a custom skin.

1. Copy an existing skin from the [uPerform installation]\Client\appdata\skins\[Course or Sim]\uPerform folder.

2. Paste the skin to the [uPerform installation]\Client\appdata\skins\[Course or Sim]\custom folder.

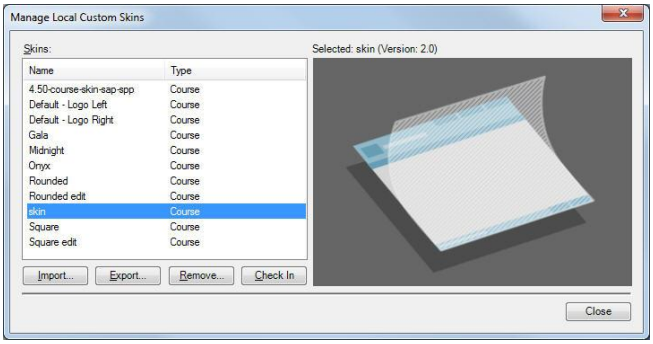
3. Rename the skin (the folder name). For example: Custom Skin 001

4. Modify the skin.css located in the [uPerform installation]\Client\appdata\skins\[Course or Sim]\custom\[renamed skin]\skin folder.

Managing Custom Skins

Managing Local Custom Skins

1. In the editor, select **FILE > MANAGE LOCAL CUSTOM SKINS...**.



Custom skins that exist on the uPerform server and are not already present on the current user's system are automatically downloaded.

If you download a custom skin while connected to the server, the uPerform client will perform a check of the local custom skin against the downloaded skin. If the local copy has been modified, the uPerform client displays a message identifying the conflicted skin state and provides the option to cancel the skin package download process. If you continue to extract the skin to the [uPerform installation]\Client\appdata\skins\[Course or Sim]\custom folder, it will overwrite the existing skin. If the local skin is older than the version on the server, it will be overwritten automatically.

2. Perform one of the following options:

If You Want To	Then
Import a custom skin	Click **Import...**. Navigate to the .uskin file on your local computer and click **Open**. Click **OK**.
Deploy a custom skin	Select a skin from the list. Click **Export...**. Deployed custom skins have a .uskin file extension.

If You Want To	Then
Delete a custom skin	Select a skin from the list. Click **Remove...**. Click **Yes**. If the skin is saved on the server, it will re-display the next time you access the *Manage Local Custom Skins* window.
Check in a custom skin	Select a skin from the list. Click **Check In**. Click **OK**.

3. Click **Close**.

Rolling Back to a Previous Version of a Custom Skin

1. Click in the uPerform server workspace.
2. Click on the project name.
3. Click **Document Library**.
4. Select the folder containing the custom skin.
5. Click on the name of the binder containing the skin you want to view.
6. In the *Translations* section, click on the name of the skin.

   A list of previous versions is displayed in the *Version History* portion of the screen.

7. Click **Rollback** on the left menu to set the current version of the skin to the previous version.

   When you confirm the rollback, the current version of the skin will be permanently deleted from the server.

8. Click **OK**.

Guidance on Modifying Cascading Style Sheets

Guidance on Modifying Cascading Style Sheets

You can modify the uPerformEndUserDocument.css file to incorporate your corporate standards (for example, font and color scheme).

A complete tutorial on modifying cascading style sheets is beyond the scope of this manual. Several books and websites discuss this topic in detail. In particular, the World Wide Web Consortium (W3C) provides helpful information at http://www.w3.org/Style/CSS/.

The following table provides general guidance on performing common customization tasks in the style sheets.

If You Want To	Go To	Modify
Customize the placement of the Continue button on assessment stencils	The **assessment** section of the CSS file.	**div#assessmentButtons** to set the text alignment and background. **div#assessmentButtons input[type=button]** to set the borders and background of all the assessment buttons. **input#btnContinue, input#btnRetry, input#btnReset, input#btnShowMe and input#btnSkipSim** to set border, color and text alignment of each respective button individually.

If You Want To	Go To	Modify
Override or replace images displayed in the course menu	The **menu** section of the CSS file.	**div#courseImage** to set the image URL for the course icon. **div#menuHereImage** to set the image URL for the menu here icon. **div#menuVisitedImag**e to set the image URL for the menu visited icon. **div#menuMinusImage** to set the image URL for the menu minus icon. **div#menuPlusImage** to set the image URL for the menu plus icon. **div#menuAssessmentImage** to set the image URL for the menu assessment icon. **div#assessmentPassedImage** to set the image URL for the assessment passed icon. **div#postAssessmentPassedImage** to set the image URL for the post assessment passed icon. **div#postAssessmentImage** to set the image URL for the post assessment icon. **div#menuBranchImage** to set the image URL for the menu branch icon. **div#menuBranchChoiceImage** to set the image URL for the menu branch choice icon. **div#branchConnectorImage** to set the image URL for the branch connector icon. **div#singleBranchImage** to set the image URL for the single branch icon. **div#extendBranchImage** to set the image URL for the extend branch icon.
Modify the username prompt in courses and simulations	The **user name prompt page** section of the CSS file.	**body.uiPromptPageBackground** to set the background of the prompt page. **td.uiPromptBackground** to set the image URL or background of the prompt box. **div#titleTextDiv** to set the text color, text alignment and font of the title. **div.uiPromptText** to set the text color, text alignment and font of the prompt text.

If You Want To	Go To	Modify
Customize the loading page in courses, simulations, and guided help	The **loading** section of the CSS file.	**div#LoadingMessage** to set the background color of the loading page. **div#LoadingMessage div#loadingText** to set the color and text alignment. **div#loadingImage** to set the logo dimensions and URL.

Chapter 13: Setting Up Online Help

The ANCILE uPerform server works in conjunction with ANCILE Help Launchpad to provide context-sensitive help within the SAP GUI for Windows and HTML GUI environments. In addition, you can specify a context-sensitive help solution directly from the uPerform server for SAP Enterprise Portal (SAP EP), SAP CRM Web Client, SAP SRM 7 Shopping application, Oracle E-Business, PeopleSoft, web applications, and Siebel.

Online help allows your end users to access relevant help stored on the uPerform server from within their current application.

Introduction to Online Help

Online performance support materials are most effective when the materials are available to end users quickly and conveniently. The most direct and effective link possible is one from a particular task in an application to the relevant help in an online performance support system. You can provide context-sensitive help for Oracle E-Business, SAP EP, SAP CRM Web Client, SAP SRM Shopping application, Siebel, PeopleSoft, generic web pages, and applications supported through Help Launchpad.

The procedures in this section cover basic set up procedures relevant to all supported applications, including:

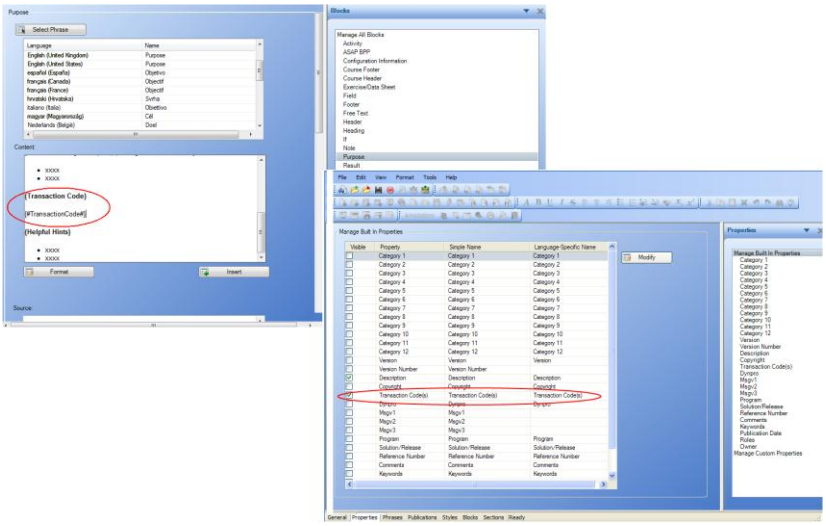
- Creating a template
- Recording a document and making it available for context-sensitive help
- Specifying a connection to the uPerform server
- Viewing and editing a connection to the uPerform server
- Configuring the application for use with context-sensitive help
- Requesting help

Creating a Template

If you are planning to provide context-sensitive help, you will need to create a template in which to store context-identifiers. Context-identifiers are stored in the **Transaction code** property of the uPerform template. Transaction code is a uPerform property used to identify a process, and is used in two separate instances:

- **Transaction code property**: The uPerform server matches this document property to the associated screen when a call for help is made. This property is only populated when you manually add a value to it. For situations where the Recorder automatically captures the context identifier, the identifiers are stored in step properties.
- **Transaction code within the Purpose block**: In a uPerform document, this displays the value contained in the transaction code property. ANCILE recommends you delete this section if you are providing context sensitive help for applications where the context identifier would not be meaningful to an end user. In some applications, such as SAP GUI for Windows and SAP HTML GUI, the context identifier is based on the task or transaction and a single context identifier is applicable for the entire document.For other applications, a screen-level context identifier is used. In these cases there may be multiple identifiers per document or the identifier is too long to be

meaningful to end users. In this case, deleting the transaction code from the Purpose block may be appropriate**.**



1. Create a template in uPerform.

   A uPerform project administrator typically creates and customizes templates. For more information, refer to Using Author Templates (on page 211).

2. Perform one of the following options:

If You Want To	Then
Provide context-sensitive help without a Transaction Code property	Select the **Blocks** tab. In the task pane, select **Purpose**. In the *Content* area, delete the lines: **{Transaction Code}** {#TransactionCode#}
Provide context-sensitive help using a Transaction Code property	Go to Step 3.

3. Click the **Properties** tab.

4. Enable the **Transaction Code** property.

   The recorder may automatically capture the contextID; however, ANCILE recommends enabling the Transaction Code property in case it is not automatically captured.

5. Save the template.

Recording a Document and Making It Available for Context-Sensitive Help

1. Log into the supported application using a designated account.

2. Perform one of the following options:

If You Want To	Then
Record and edit the document	Using the template you created in Creating a Template, record and edit the document using the uPerform client and the procedures described in the *Creating Content with ANCILE uPerform* user manual.
Insert steps into a previously recorded uPerform document	Update the template associated with the uPerform document. Open the uPerform document associated with the template. Select the **Simulation** tab. Select **INSERT > STEPS > FROM NEW RECORDING**. Record the steps using the uPerform client and the procedures described in the *Creating Content with ANCILE uPerform* user manual. Edit the uPerform document. For more information on recording, editing, and using the recorder toolbar, refer to the companion manual *Creating Content with ANCILE uPerform*.

3. Perform one of the following options:

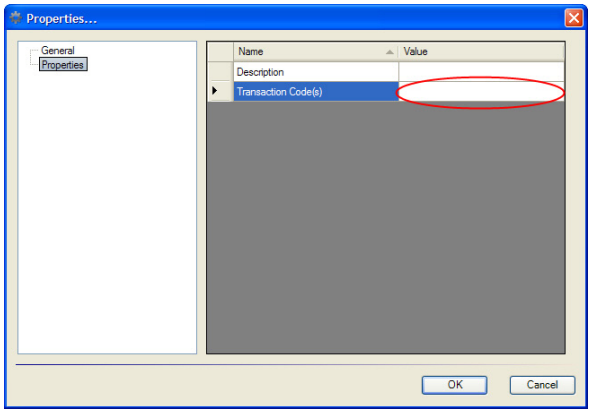
If You Want To	Then
Provide context-sensitive help using Oracle E-Business.	Specify an author account as described in Specifying an Author Account for Oracle E-Business. Revisit the screens in the application for which you want to provide context-sensitive help, and click on the help icon on each screen captured in the recorded document. This will open up a new browser window containing the context identifier for the screen. Highlight and copy the context identifier string from the browser window. Repeat until context identifiers for all screens within the procedure have been collected. Go to Step 4.

If You Want To	Then
Provide context-sensitive help using SAP SRM version 4-6	Perform the steps described in Modifying the Workplace Integration API. Revisit the screens in the application for which you want to provide context-sensitive help, and click on the help icon on each screen captured in the recorded document. Highlight and copy the context identifier string from the browser window. Repeat until context identifiers for all screens within the procedure have been collected. Go to Step 4.
Provide context-sensitive help using SAP EP, SAP CRM Web Client, SAP SRM version 7, SAP GUI for Windows, SAP HTML GUI, Siebel, PeopleSoft 9, and generic web pages	If iView/Portal page IDs are not automatically collected, enable and include the iView/Portal Page IDs as needed. Refer to Enabling the Required iView/Portal Page Options (on page 306), Locating the iView/Portal Page ID (on page 307), and Including the iView/Portal Page ID in Documents (on page 307). Go to Step 9.

4. Open the uPerform document created in Step 2.

5. Select **FILE > PROPERTIES**.

6. Select **Properties**.



7. To provide context-sensitive help using Oracle E-Business, paste the identifier(s) into the **Transaction Code** property.

8. Click **OK**.

9. Save the document.

10. From the uPerform client, check your document into the server.

When published, the document will be available for the end user via the help icon in the application for which you want to provide context-sensitive help.

Specifying a Connection to the uPerform Server

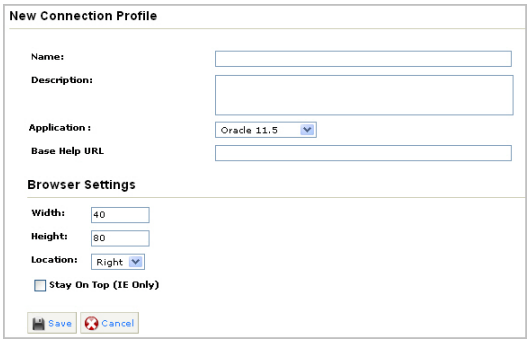
1. In uPerform, select **Administration** in the left navigation pane.

2. Select **Server Administration**.

3. Select **Integration Settings** under *Server Administration*.

4. Select **Context Sensitive Help Connection Profiles** under *Integration Settings*.

5. Select **New Connection Profile**.



6. Complete/review the following fields:

This profile is configurable and can be edited or deleted based upon your end user needs. You can specify as many connection profiles as necessary. You must specify a connection for each instance of the application for which you want to provide context-sensitive help.

Field	Description
Name	Enter the name of the connection profile.
Description	Enter details describing the profile.
Application	Select the application from the drop-down list.
Base Help URL	Enter the URL of the help application for which you want to provide context-sensitive help. For example: http://[servername]/path This option is not available for Help Launchpad or Web Profiles.

Field	Description
Search Method	This option is available only for the **Web** application. Select **Transaction Code** to search by the uPerform transaction code property only, **Full Text (All Words)** to allow an AND search based on properties, or **Full Text (Any Words)** to allow an OR search based on properties.
Width	Set the width of the browser window in which the help will display.
Height	Set the height of the browser window in which the help will display.
Location	Specify the location of the browser window in which the help will display.
Stay on Top	Select this option to allow the browser window containing help to display on top of all open applications. This option is available for use only with Internet Explorer.

7. Click **Save**.

Viewing and Editing a Connection to the uPerform Server

1. In uPerform, select **Administration** in the left navigation pane.
2. Select **Server Administration**.
3. Select **Integration Settings** under *Server Administration*.
4. Select **Context Sensitive Help Connection Profiles** under *Integration Settings*.
5. Select the connection profile you want to view or edit.
6. Perform one of the following options:

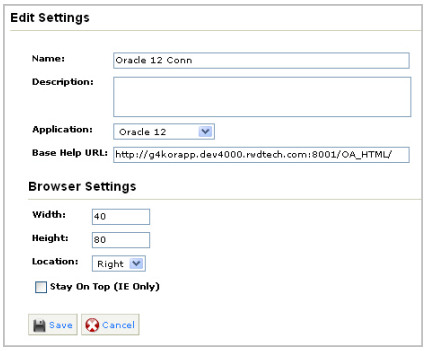
If You Want To	Then
View the connection	Go to Step 7.
Edit the connection	Go to Step 8.

7. Review the following fields:

Field	Description
Application	The application specified for context-sensitive help.
Applications Help Web Agent Profile Setting	This value is generated by uPerform and is not configurable. (Oracle only)

Field	Description
Applications Help Web Agent Profile Setting for Authors	This value is generated by uPerform and is not configurable.(Oracle only)
URL	This value is generated by uPerform and is not configurable. (Help Launchpad, PeopleSoft, SAP Portal, Siebel, and Web)
SR13 PlainHTML Server Name	This value is generated by uPerform and is not configurable.(SAP CRM only)
SR13 PlainHTML Server Path	This value is generated by uPerform and is not configurable.(SAP CRM only)
Search Method	This option is available only for the **Web** application. Select **Transaction Code** to search by the uPerform transaction code property only, **Full Text (All Words)** to search based on properties, or **Full Text (Any Words)** to search based on properties.
Width	The width of the browser window in which the help will display.
Height	The height of the browser window in which the help will display.
Location	The location of the browser window in which the help will display.
Stay On Top (IE Only)	This option allows the browser window containing help to display on top of all open applications. This option is available only for use with Internet Explorer.

8. Click **Edit Settings**.



9. Edit/review the following fields:

Field	Description
Name	Enter the name of the connection profile.
Description	Enter details describing the profile.
Application	Select the application from the drop-down list.

Field	Description
Base Help URL	Enter the URL of the help provided by the application. Example: http://[servername]/path
Search Method	This option is available only for the **Web** application. Select **Transaction Code** to search by transaction code, **Full Text (All Words)** to search to return results based on properties, or **Full Text (Any Words)** to search to return results based on properties, as well as words provided in the document.
Width	Set the width of the browser window in which the help will display.
Height	Set the height of the browser window in which the help will display.
Location	Specify the location of the browser window in which the help will display.
Stay on Top	Select this option to allow the browser window containing help to display on top of all open applications. This option is available for use only with Internet Explorer.

10. Click **Save**.

Configuring Oracle E-Business for Use with Context-Sensitive Help

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the uPerform server via a direct link in the Oracle E-Business application.

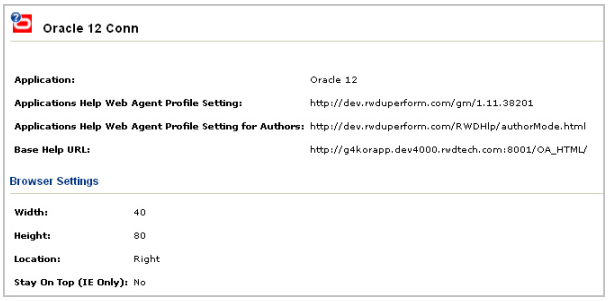
Specifying an Author Account for Oracle E-Business

The Oracle system administrator must create a designated author account in Oracle E-Business. This account communicates with the uPerform server to generate the screen data necessary to request help from Oracle E-Business.

You must log into Oracle E-Business using a designated author account in order to record help-ready documents. Context-sensitive help is not available when logged in via the author account.

For more information on creating user accounts, refer to the Oracle E-Business documentation.

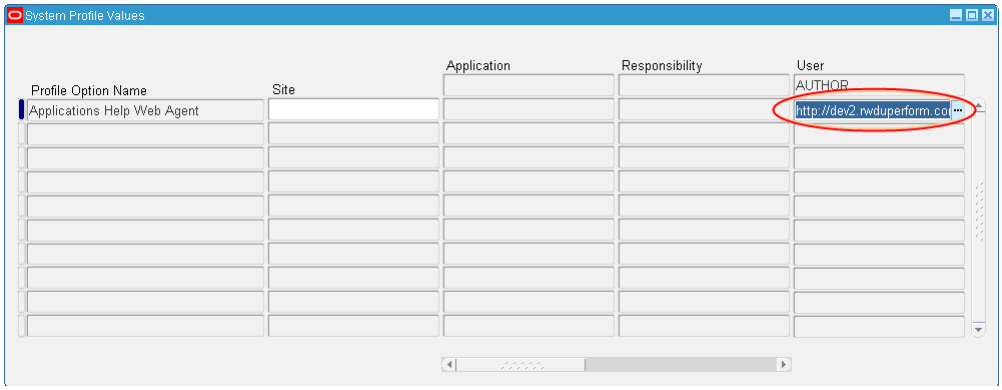
1. In uPerform, select **Administration** in the left navigation pane.
2. Select **Server Administration**.
3. Select **Integration Settings** under Server Administration.
4. Select **Context Sensitive Help Connection Profiles** under Integration Settings.
5. Select the connection profile.


Oracle 12 Conn
Application: Oracle 12
Applications Help Web Agent Profile Setting: http://dev.rwduperform.com/gm/1.11.38201
Applications Help Web Agent Profile Setting for Authors: http://dev.rwduperform.com/RWDHlp/authorMode.html
Base Help URL: http://g4korapp.dev4000.rwdtech.com:8001/OA_HTML/
Browser Settings
Width: 40
Height: 80
Location: Right
Stay On Top (IE Only): No

6. Review the following system-generated values:

Field	Description
Applications Help Web Agent Profile Setting	This value is pasted into the Applications Help Web Agent profile setting for the end user in Oracle E-Business. This value is generated by uPerform and is not configurable. Refer to Modifying Oracle E-Business End User Accounts for Use with Context-Sensitive Help (on page 303) for information on using this value to modify end user accounts in Oracle.
Application Help Web Agent Profile Setting for Authors	This value is pasted into the Application Help Web Agent profile setting for the designated author in Oracle E-Business. This value is generated by uPerform and is not configurable.

7. Copy the URL from the **Applications Help Web Agent Profile Settings for Authors** field.



8. Paste the author setting URL into the Applications Web Help Agent profile setting User column for the author in Oracle E-Business.

   For more information on setting system profile values, refer to the Oracle E-Business documentation.

9. Save the author settings.

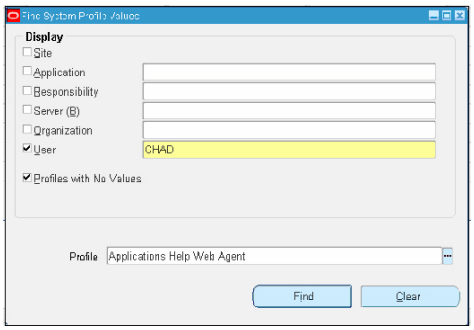
Modifying Oracle E-Business End User Accounts for Use with Context-Sensitive Help

You must modify all existing user accounts to enable context-sensitive help. An Oracle E-Business administrator creates end user accounts based on the needs of the company. While there are several options for defining system profile values for existing users, this procedure demonstrates defining a system profile value for an individual user.

1. Log into Oracle E-Business as a system administrator.

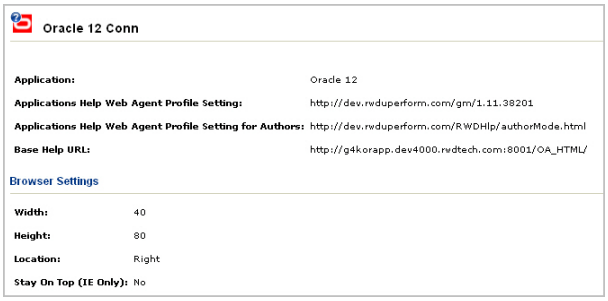
2. Define system profile values for the user.

   Refer to the Oracle E-Businessdocumentation for information about the System Profile Values **Site**, **Application**, **Responsibility**, and **User**, and to choose which system profile value is most appropriate for your end user community.

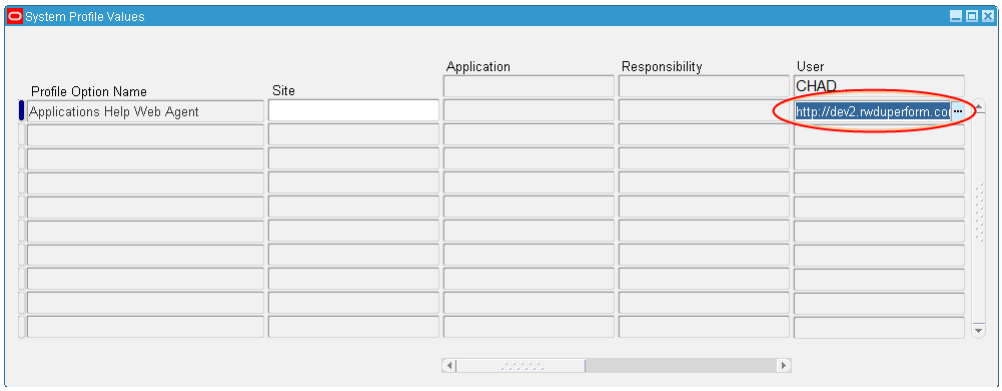


3. In uPerform, open the profile connection you created as described in Specifying a Connection with the uPerform Server.

   This profile contains all of the information necessary to manage a connection with Oracle E-Business.


Oracle 12 Conn
Application: Oracle 12
Applications Help Web Agent Profile Setting: http://dev.rwduperform.com/gm/1.11.38201
Applications Help Web Agent Profile Setting for Authors: http://dev.rwduperform.com/RWDHlp/authorMode.html
Base Help URL: http://g4korapp.dev4000.rwdtech.com:8001/OA_HTML/
Browser Settings
Width: 40
Height: 80
Location: Right
Stay On Top (IE Only): No

4. Copy the URL from the **Applications Help Web Agent Profile Settings for End Users** field.



5. In Oracle E-Business, paste the end user setting URL into the Applications Web Help Agent profile setting column of the system profile value you selected earlier in this section.

6. Save the end user settings.

Configuring SAP Portal for Use with Context-Sensitive Help

SAP EP is a web-based platform for delivering information from various sources to end users. Using the URL to Help Topic setting, the SAP EP can display the correct content for each iView/Portal Page in a browser window that displays on top of the SAP EP application.

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the uPerform server via a direct link in the SAP EP application.

When creating custom Help links in an application that will be hosted in an iView, consider using an approach similar to that used in the context-sensitive solution for the iView itself.

- ❒ Assign a unique identifier to each Help link. Recall that each iView in an SAP EP system has a unique alphanumeric identifier (for example, "com.sap.portal.createNewUser") that can be used as a reliable link between an iView and its related help content. Each custom Help link should also have a unique identifier that can be included in the properties of applicable uPerform documents.

- ❒ Include the unique Help link identifier in uPerform documents. uPerform allows the author to specify the iView ID(s) to which the document applies. The Help link unique identifier should also be specified in the document.

Enabling the Required iView/Portal Page Options

To enable end users to access context-sensitive help for an iView/portal page, the Help option must be enabled. Each iView/portal page Help option is disabled by default; however, an SAP EP user with the appropriate permission to edit an iView/portal page can enable the Help option via the Property Editor.

Each iView and portal page in a portal system can be contained in a tray. The tray includes the name of the iView/portal page and a drop-down menu of options such as Refresh, Open in New Window, Personalize, Details, and Help.

To enable the iView/portal page required options:

1. Log into SAP Enterprise Portal with Content Administrator permission.

2. In the Portal Catalog, right-click on the desired iView/portal page and select Open > Object.

An iView or portal page may display in several different contexts based on your role within the SAP EP. For example, the "Create User" iView may be configured differently for Super Administrators than it is for Content Administrators. In addition, note the specific role(s) in which an iView/portal page is to be modified. If more than one role applies, the iView/portal page must be edited for all roles.

3. In the editing area, select the Property Editor panel located to the right of the editing area.

4. In the Property Category list, select **Show All**.

5. For the *Show 'Details'* option property, click **Yes**.

6. For the *Show 'Help'* option property, click **Yes**.

7. For the *Show Tray* option property, click **Yes**.

8. Click **Save**.

Locating the iView/Portal Page ID

Each iView and portal page in SAP EP has a unique alphanumeric identifier, which is registered in the portal content directory (PCD). The identifier is assigned when a new iView/portal page is created in the Portal Content Studio. Because identifiers are unique, they can be used as reliable links between an iView/portal page and its related help content.

To link an iView or portal page to help content, the iView/portal page ID must be included in the properties of the applicable uPerform document(s). To allow authors to easily locate an iView/portal page's ID, the Details option must be enabled. An author can determine the iView/portal page ID via its details window by selecting the Details option within SAP EP. This will display a new browser window containing the Portal Component and Object ID.

The Object ID is a string of alphanumeric characters. You may choose to use the entire Object ID as the iView/portal page ID, or simply use the segment of the Object ID that follows the last "/" divider.

Including the iView/Portal Page ID in Documents

ANCILE uPerform allows the author to populate properties within the document. The uPerform server uses these properties to produce search results. For transaction-based SAP procedures, the author can specify the SAP transaction code(s) to which the document applies. The author can specify an iView/portal page ID, instead of a transaction code. uPerform provide a Properties window for populating the Transaction Code(s) property within the document.

Setting the Help URL for an iView/Portal Page

The URL to Help Topic property was introduced in EP6 SP17 and EP7 SP10 as a simple way to direct end users to the correct help URL; however, if you wish to configure the help URL for iViews or portal pages for which the URL to Help Topic property is not available, you may do so by using the PCD Inspector. The procedure for determining which procedure to use for setting the help URL depends on the following criteria.

- ❒ The version and service pack (SP) of your SAP EP system
- ❒ Whether you wish to enable the Help option on an iView or portal page

SAP EP Version	Service Pack (SP) Version	Set Help URL for iViews via	Set Help URL for Portal Pages via
6	Prior to SP17	PCD Inspector	PCD Inspector
	SP 17-20	Portal Content Administrator	PCD Inspector
7	Prior to SP 10	PCD Inspector	PCD Inspector
	SP 10-12	Portal Content Administrator	PCD Inspector
	SP 13	Portal Content Administrator	Portal Content Administrator
7.30	0	PCD Inspector	PCD Inspector

Setting the Help URL Using Portal Content Administration

If you are setting the URL to Help Topic property for an iView/portal page, you may do so using Portal Content Administration.

To set an iView/portal page URL to Help Topic property using Portal Content Administration:

1. Log into SAP Enterprise Portal with Content Administrator permission.
2. In the Portal Catalog, right-click on the desired iView/portal page and select **OPEN > OBJECT**.

An iView or portal page may display in several different contexts based on role within the SAP EP. For example, the "Create User" iView may be configured differently for Super Administrators and Content Administrators. Therefore, it is important to note the specific role(s) in which an iView/portal page is to be modified. If more than one role applies, then the iView/portal page must be edited for all roles.

3. Locate the Property Editor panel to the right of the editing area.
4. In the Property Category list, select **Show All**.
5. In the list of properties, scroll to the URL to Help Topic property.

6. Enter the connection profile URL.

7. Click **Save**.

Setting the Help URL Using the PCD Inspector

1. Log into SAP Enterprise Portal with Content Administrator permission.

2. From the Portal's top menu, click **System Administration**.

3. From the *System Administration* page, click **Support**.

4. From the Support page Top Level Areas list, click **Portal Content Directory**.

5. In the Test and Configuration Tools list, click **PCD Inspector**. You may see warnings at this point; confirm these warnings and continue.

6. From the PCD Inspector browser, check the box next to **portal_content**.

7. Click **Browse Into**.

8. Repeat Step 6-7 as necessary until you reach the desired iView/portal page.

9. Select the checkbox next to the desired portal page, and click **PropEditor**. This will open a new browser window for the PCD Generic Layer Property Editor.

10. Click **Switch to PCM**.

11. From the *List of All Properties* list, choose **com.sap.portal.iview.HelpURL**.

12. Click **Edit**.

13. Build the help call URL by appending the **Object ID** copied in the Locating the iView/Portal Page ID (on page 307) to the URL generated when you specified a connection to the server using the procedures found in Specifying a Connection with the uPerform Server.

14. Paste the URL into the **Property Value** field.

15. Click **Save**.

Modifying the Help Link in the Portal Masthead

By default, the Help link in the SAP EP masthead launches the SAP Help Portal; however, the Portal Content Administrator can change the URL that is displayed by this Help link. For example, you may wish to have this Help link display the home page of your custom or uPerform-generated website or display a specific page on your corporate intranet.

To select the URL that is displayed by the Help link in the Portal masthead, perform the following steps:

1. In the Portal Catalog, go to **Portal Users > Standard Portal Users.**
2. Right-click on the *Default Framework* page and select **OPEN > OBJECT**.
3. Check the *Masthead iView* checkbox and click **Properties**.
4. In the Property Editor, from the *Property Category* drop-down list, select **Navigation**.
5. In the Property Editor, locate the **URL of Help Link** property.
6. In the URL of Help Link property, enter the URL of the site you want to display.
7. Click **Save**.

Configuring SAP SRM 4-6 for Use with Context-Sensitive Help

SAP SRM captures context IDs and allows the SRM system to display the correct help content for each screen in a separate browser window. The context-sensitive help solution for SAP SRM provides custom help for only SRM Enterprise Buyers Professional (EBP) screens via the Help link in each screen.

One of the things that can be contained within an SAP EP iView is the SAP SRM user interface. In other words, a user can perform an SAP SRM transaction from within an iView. If a customer wants context-sensitive help for an SAP EP iView (regardless of what the iView contains), then the context-sensitive help solution for SAP EP is required.

Obtaining the Help Launchpad Code Supplement

Download the Help Launchpad Code Supplement for SAP SRM from the ANCILE Product Support Center (https://ancile.parature.com). This code supplement was authored by ANCILE for use by uPerform customers only. The code supplement file contains JavaScript code that redirects the SAP SRM's existing Help link to a help page created with uPerform.

Modifying the Workplace Integration API

SAP Internet Transaction Server (ITS) embeds the wpintegration.js client-side script into every SRM screen at runtime. This script provides programmatic access to several SRM screen functions, including the Help link. By modifying the wpintegration.js script via the ABAP Workbench, we are able to intercept and redirect help calls made from this Help link.

Refer to the appropriate instructions and SAP Note(s) for changing JavaScript files via the ABAP Workbench.

To modify the Workplace Integration API:

1. Log into the appropriate SAP System using SAP GUI.
2. Open the **ABAP Workbench Object Navigator** using transaction SE80.
3. In the Object Navigator, select the Internet Service **BBPGLOBAL**. The Web Application Builder is started.
4. Select **WPINTEGRATION.JS** from the Mime Objects located under the BBPGLOBAL item in the Object list.

5. Right-click **WPINTEGRATION.JS** and select **Change**.

6. If prompted, click the green check.

7. If prompted, click **Maint. in logon lang**.

8. Click **Save As Local File**.

9. Create a backup copy of the wpintegration.js file (e.g., wpintegration.js.bak) on your local computer.

10. In the Web Application Builder, scroll to the bottom of the **wpintegration.js** file.

11. Append the Help Launchpad code supplement to the end of the **wpintegration.js** file.

12. In the code supplement, locate and edit the following fields:

Field	Description
HELP_SERVER_LOCATION	Eneter the connection profile URL
HELP_FALLBACK_LOCATION	Location of the fallback help, in case a scripting error occurs during context-sensitive help. The fallback help does not automatically redirect the user to a given website when there is a help page that cannot be found. The context-sensitive help solution for SRM cannot determine whether or not a specific help page exists on a given website.
SCREEN_ID_TEXT	Message text used to indicate the screen ID.
SHOW_ID	Determines whether the screen ID is displayed in the new window launched from the screen Help link: true = show screen ID false = show help content
HELP_WINDOW_LEFT	Help window left position in pixels.
HELP_WINDOW_TOP	Help window top position in pixels.
HELP_WINDOW_WIDTH	Help window width in pixels.
HELP_WINDOW_HEIGHT	Help window height in pixels.

13. Save the **wpintegration.js** file.

14. Select the **BBPGLOBAL Internet Service** from the Object Navigator list.

15. Click **Publish**.

    You should receive a message at the bottom of the screen stating the object published successfully.

16. Refresh the SRM screen displayed in the web browser.

You may need to clear your browser's cache or Temporary Internet Files.

This modification affects all screens in the SRM system. Be sure to verify that each screen has online help available.

Determining the Screen ID

Each screen in an SRM system has a unique alphanumeric identifier (ID). This ID can be used as a reliable link between an SRM screen and its related help content. To link an SRM screen to help content, the ID must first be included in the applicable uPerform document(s).

If the **SHOW_ID** property is set to true, any user with access to an SRM screen can determine its ID using the Help link:

1. In the wpintegration.js file, ensure that the SHOW_ID property is set to **true**.
2. Save the **wpintegration.js** file.
3. Click **Publish**.
4. Refresh the SRM screen displayed in the web browser.

You may need to clear your browser's cache or Temporary Internet Files.

5. In the desired BSP application screen, select the **Help** link to open a new window that displays the ID for the screen.

Including the SRM Screen ID in Documents

ANCILE uPerform allows the author to populate properties within the document. uPerform leverage these properties when building website navigation and quick launch pages, while the uPerform server uses these properties to produce search results.

uPerform provides a Properties window for populating the Transaction Code(s) property within the document. To map a uPerform document to a SRM screen via the Properties tab:

1. Ensure that the **Transaction Code(s)** built-in property is marked as visible in the uPerform template. By default, the display of all built-in properties is disabled in the template.
2. Open the desired uPerform document associated with the template.
3. Select **FILE > PROPERTIES…**.

4. Click **PROPERTIES** on the left pane.

5. Select the **Transaction Code**(s) field.

6. Enter the iView/portal page ID or the screen ID in the Transaction Code(s) field. For multiple pages or IDs, separate each with a comma.

7. Click **OK**.

8. Select **FILE > SAVE** to save your uPerform document.

Viewing Help Content for an SRM Screen

If the SHOW_ID property is set to false, any user with access to an SRM screen can view help content for the screen using the Help link:

This modification affects the Help link for every SRM screen. Be sure to verify that help content is ready for each available SRM screen before performing the following steps. The Help link links blindly to a page that matches its ID.

1. In the wpintegration.js file, ensure that the SHOW_ID property is set to **false**.

2. Save the **wpintegration.js** file.

3. Click **Publish**.

4. Refresh the SRM screen displayed in the web browser.

   You may need to clear your browser's cache or Temporary Internet Files.

5. In the desired Business Server Pages (BSP) application screen, select the Help link to open a new browser window that displays help content for the screen.

Configuring SAP CRM Web Client for Use with Context-Sensitive Help

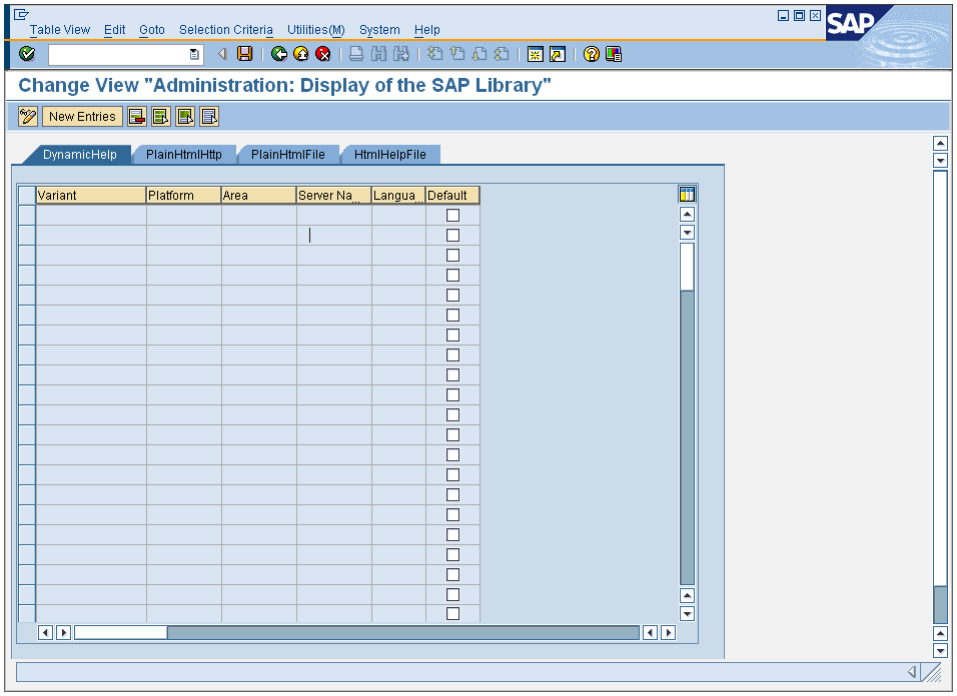
Before you can specify a connection between the uPerform server and SAP CRM Web Client, you must activate context-sensitive help within SAP CRM Web Client. The context-sensitive help option is indicated by a question mark (?) in the SAP CRM Web Client user interface. When a user clicks on the ?, any help created for that screen will display. For more information on activating context-sensitive help within SAP CRM Web Client, refer to the SAP CRM Web Client documentation. Context-sensitive help for SAP CRM Web Client is available only through the IC Web Client.

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from ANCILE uPerform via a direct link in the SAP CRM Web Client application.

Configuring SAP CRM Web Client to Send a Help Request to the uPerform Server

The SAP system administrator must configure SAP CRM Web Client to send help requests to the uPerform server. This configuration is specified by adding variants to the PlainHtmlHttp tab of the SR13 transaction code.

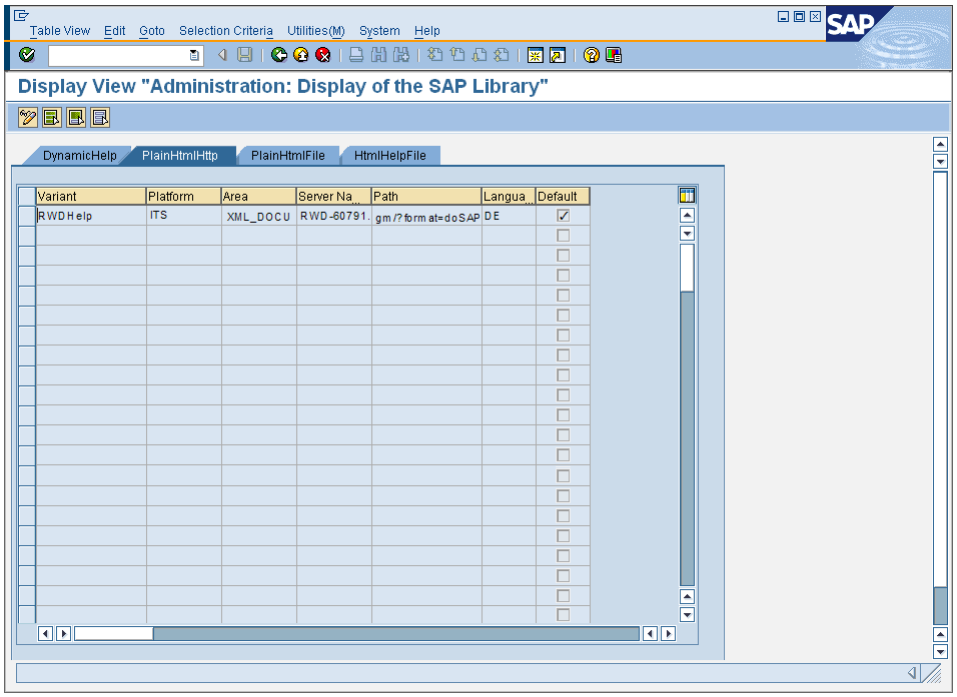
1. Log into SAP CRM via the SAP GUI.
2. Enter the transaction code **SR13**.



3. On the **DynamicHelp** tab, delete any existing entries.

4. Click .

5. Select the **PlainHtmlHttp** tab.



6. Complete the following fields:

Field	Description
Variant	Enter a variant name. Example: **ANCILEHelp**
Platform	Enter a platform. Example: **ITS**.
Area	Enter an area. Example: **XML_DOCU**
Server Name	In uPerform, copy the URL from the **SR13 PlainHtmlHttp Server Name** field as described in Viewing and Editing a Connection to the uPerform Server (on page 299). This value is generated by uPerform and is not configurable. Paste the URL into the **Server Name** field.
Path	In uPerform, copy the URL from the **SR13 PlainHtmlHttp Server Path** field as described in Viewing and Editing a Connection to the uPerform Server (on page 299). This value is generated by uPerform and is not configurable. Paste the URL into the **Path** field.

Field	Description
Language	Enter the language key. Example: For German, enter **DE**.
Default	Select this checkbox if the language specified is the default help language.

7. Click .

8. Start the **SAP Reference IMG** using the transaction code **SPRO**.

   For more information on the SPRO transaction code, refer to SAP note 1038204.

9. Click **Manage Worklist**.

10. Click **SAP Reference IMG**.

11. Select **KNOWLEDGE MANAGEMENT > SETTINGS IN THE APPLICATION SYSTEM > SEQUENCE OF ENHANCEMENTS IN CUSTOMER NAME SPACES**.

12. Double-click on **Sequence of Enhancements in customer Namespace**.

13. Select **Execute**.

14. Restart the SAP CRM Web Application Server.

Context-Sensitive Help for Siebel 8

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the uPerform server via a direct link in Siebel 8.

Obtaining the Siebel Custom Menu eScripts

Download the Siebel Custom Menu eScripts from the ANCILE Product Support Center (https://ancile.parature.com). The following scripts were authored by ANCILE for use by uPerform customers only. These scripts contain JavaScript code that redirects Siebel's existing Help link to a help page created with uPerform.

- uPerform_Service_PreCanInvokeMethod_Server.txt
- uPerform_ServicePreInvokeMethod_Browser.txt

Creating a Custom Menu In Siebel 8

ANCILE recommends creating a custom menu in the test environment and migrating the changes to the production environment after the changes have been compiled and tested.

All actions within this procedure should be performed by a Siebel administrator using Siebel Tools. The administrator should be familiar with the topics discussed in the "Developing and Deploying Siebel Business Applications," document provided by Oracle Siebel.

1. Create a new project to contain changes needed to add a context-sensitive help link from Siebel 8 to the uPerform server. Be sure to include a name and description for the project.
2. Check out the context-sensitive help project.
3. Check out the menu used in the target application.

4. Create a new symbolic string for the menu item using the following values:

A symbolic string must be created for each locale.

Field	Description
Name	Enter a name for the symbolic string.
Current String Value	Enter the string value.
Project	Enter the project name created in Step 1.
Definition	Enter a definition.
Comment	Enter any amplifying information about the string.

5. Save the string.

6. Create a new business service using the following values:

Field	Description
Name	Enter a name for the service.
Project	Enter the project name created in Step 1.
Class	Enter **CSSService**.
Comment	Enter any amplifying information about the service.

7. Save the service.

8. Create a new Business Service Method called **calluPerform**.

9. Right-click on the business service you created in Step 6.

10. Select **Edit Server Scripts**.

11. Select **eScript**.

12. Paste the ANCILE-provided script into the **Service_PreCanInvokeMethod** method.

13. Save the server script.

14. Right-click on the business service you created in Step 6.

15. Select **Edit Browser Scripts**.

16. Select **eScript**.

17. Paste the code from the ANCILE-provided **uPerform_Service_PreInvokeMethod_Browser.txt** script into the **Server_PreInvoke Method**.

18. In the code pasted into the **Server_PreInvoke Method**, replace **[URL from connection profile]** with the URL of the uPerform server specified in the connection profile (for example: http://uperform.company.com/gm/1.11.5343?csh=

19. Save the browser script.

20. Using Siebel Tools, create a new command using the following values:

Field	Description
Name	Enter a name for the command.
Project	Enter the project name you created in Step 1.
Business Service	Enter the business service you created in Step 6.
Display Name	Enter a display name for the command.
Method	Enter **callUperform**.

21. Save the command.

22. Create a new menu item for the menu project using the following values:

Field	Description
Name	Enter a name for the menu item.
Caption	Enter the string reference created in Step 4.
Command	Enter the command created in Step 20.
Position	Select the appropriate position.

23. Save the menu project.

24. Compile, test, and migrate the changes to the production environment.

Configuring PeopleSoft 9 for Use with Context-Sensitive Help

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the uPerform server via a direct link in the PeopleSoft 9 application.

Creating the Custom Help Link in PeopleSoft 9

1. In the PeopleSoft application navigate to the **PEOPLETOOLS >WEB PROFILE > WEB PROFILE CONFIGURATION** page.
2. Click **Search**.
3. Click the Profile Name you specified during the PeopleSoft Pure Internet Architecture installation.
4. Change the value for the **Help URL** field to the URL from the connection profile you specified in Specifying a Connection with the uPerform Server.
5. Click **Save**.

Configuring ANCILE Help Launchpad to Deliver Context-Sensitive Help

ANCILE Help Launchpad works in conjunction with the uPerform client and server to help you deliver content to end users through a direct link in the SAP Help system.

Configuring Help Launchpad to Provide Context-Sensitive Help via the uPerform Server

To configure Help Launchpad to provide context-sensitive help using uPerform, refer to the *Help Launchpad for ANCILE uPerform* user manual.

Please note that the following modifications must be made:

- ❒ Help Launchpad should be set to launch as "Browser (not controlled)."
- ❒ The screen size, location, and stay-on-top functionalities are controlled by uPerform, and will override the Help Launchpad defaults/customizations.

Configuring Generic Web Pages for Use with Context-Sensitive Help

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the uPerform server via a direct link in the Internet Explorer 7, 8, or 9 application.

End users will need to install the **uPerform_CSH.msi** plug-in on their computers, which is located in the uPerform server folder: **[install]\Collaboration\WWW\ANCILEHlp**, or you can push the installation out via a system management server (SMS).

End users with the 64-bit version of Internet Explorer must install the **uPerform_CSH_x64.msi** plug-in to use generic context-sensitive help. Both the 32-bit and 64-bit versions can be installed side-by-side.

Installing the **uPerform_CSH_x64.msi** plug-in will not install context-sensitive help into the default 32-bit version of Internet Explorer.

Creating the Help Link for Web Pages Using Internet Explorer

1. Close all instances of Internet Explorer.
2. Copy the **uPerform_CSH.msi** or **uPerform_CSH_x64.msi** file to your end user desktop from the **\WWW\ANCILEHlp** folder.
3. Double-click on the **uPerform_CSH.msi** or **uPerform_CSH_x64.msi** package.
4. Click **Next**.
5. Click **Next**.
6. Click **Next**.
7. Optionally, select a language. The default is English US.
8. Enter the server URL (from the connection profile).
9. Click **OK**.
10. Click **Finish**.

11. Launch Internet Explorer.

12. Click the **Help** icon, or select **HELP > REQUEST HELP FROM ANCILE UPERFORM** to confirm the help link has been properly installed.

Providing Help to End Users

If anonymous access has not been enabled for the project containing the requested help content, the end user will have to login to the uPerform server when requesting help. This login requirement can be avoided by enabling Single Sign-On. Refer to the companion manual, *ANCILE uPerform Administration*, for detailed information on enabling Single Sign-On.

For detailed instructions on enabling anonymous access for a project, refer to Enabling Project Settings.

Requesting Help

1. Log into the application as an end user.
2. Navigate to the desired screen.
3. Perform one of the following options

If You Want To	Then
View context-sensitive help for Oracle E-Business, SAP CRM Web Client 2007, SAP Portal, Siebel 8, or PeopleSoft 9	Click the help icon for a screen. Go to Step 4.
View context-sensitive help for Generic Web Pages	Click the **Request Context-Sensitive Help** toolbar button, or select **HELP > REQUEST CONTEXT-SENSITIVE HELP**. Go to Step 4. Context-sensitive help can be accessed from the right-click context menu in Internet Explorer.
Modify server URL for Generic CSH plug-in	Click the **Request Context-Sensitive Help** toolbar button, or select **HELP > ANCILE UPERFORM HELP SETTINGS...**. Enter a URL in the **UPERFORM SERVER URL:** field.
Exclude URLs from context-sensitive help for Generic CSH plug-in	Click the **Request Context-Sensitive Help** toolbar button, or select **HELP > ANCILE UPERFORM HELP SETTINGS...**. Enter a URL in the **URLS TO EXCLUDE FROM CONTEXT-SENSITIVE HELP:** field.

If You Want To	Then
View context-sensitive help for applications using Help Launchpad	Refer to the *Help Launchpad for ANCILE uPerform* user manual. Go to Step 4.
View context-sensitive help for Windows-based applications.	Select the application's Help control. Go to Step 4.

4. A new browser window will open, displaying the following potential help options:
   - ❒ If a single help document has been created, the document displays in the new browser window.
   - ❒ If more than one help document has been created, a list of documents displays in the browser window.
   - ❒ If no help document has been created, a zero search result window displays.

If stay-on-top is enabled, the help document remains on top of the application screen. Stay-on-top is only supported for Internet Explorer 7 and 8.

5. Choose from the following options:

If You Want To	Then
Select a help document	Click on the hyperlink for the document you wish to view.
Access the [Application Name] Help Center	Click **[Application Name] Help** in the upper left to display default help for the application. This option is available if a BaseHelp URL was specified when configuring the connection profile.
Return to the application	Close the browser window.
Search for additional content	Enter a search term(s) in the **Search** field. Click **Search**.
Search for two terms	Enter Term 1 followed by AND followed by Term 2. For example, Project AND accounting This would find all uPerform content that contains **both** Project and accounting.
Search for one term or another	Enter Term 1 followed by OR followed by Term 2. For example, Project OR accounting This would find all uPerform content that contains **either** Project or accounting.

If You Want To	Then
Search for literal string	Enter the literal string in quotation marks. For example, "Project Accounting" This would find all uPerform content that contains the exact string "Project Accounting".

Literal search strings cannot contain either # or ! within the string. These are stripped out by the uPerform server as non-allowed characters.

Appendix A: Incorporating Info Pak Content

The Migration Wizard delivered with ANCILE uPerform allows you to migrate your ANCILE Info Pak project into the uPerform server. In addition, you can use the Migration Wizard to enable display of Info Pak content from the uPerform website and to transform Info Pak documents and simulations to uPerform documents.

Introduction to Incorporating Info Pak Content

ANCILE uPerform includes a tool, the Migration Wizard, which allows you to migrate your Info Pak project to uPerform. The Migration Wizard also allows you to link from your uPerform website to content created and published by Info Pak. Finally, the Migration Wizard includes functionality to allow you to transform Info Pak documents and simulations to uPerform documents.

Your Info Pak - Web Architect and Info Pak - Glossary database information will be migrated to uPerform when you use the Migration Wizard. You can choose to have your Info Pak documents remain outside of uPerform and edit and publish these documents using Info Pak. Alternately, you can transform your Info Pak documents to uPerform documents that can be edited and published using uPerform.

The Migration Wizard performs four major functions:

- Migrates the Info Pak - Web Architect database content to uPerform, creating your document library in uPerform. The Migration Wizard creates placeholders to check in the Info Pak documents. It also creates your website structure to match the website generated by Info Pak.

- Migrates the Info Pak - Glossary database content to uPerform, populating your current terms and definitions in uPerform. Authors can then enter all new terms and definitions into uPerform for use in the uPerform content. Any terms and definitions that must also go into the Info Pak - Glossary for use in Info Pak documents must be entered in the Info Pak - Glossary as well.

- Creates links from your uPerform website. When navigating the uPerform website, the end user will view a uPerform-generated website that points to existing Info Pak and uPerform content that is glued together via links generated during the migration process. This form of linking to both Info Pak content and uPerform content is referred to as operating in "dual mode".

- Transforms your Info Pak documents and simulations to uPerform documents. You can then edit these uPerform documents and check them into the server and provide them to your users via the uPerform website.

Using Dual-Mode Functionality vs. Transformation Functionality

If you will be creating new content with uPerform, but your end users still need to access Info Pak content, the dual-mode functionality allows you to leverage your existing Info Pak content on the uPerform website.

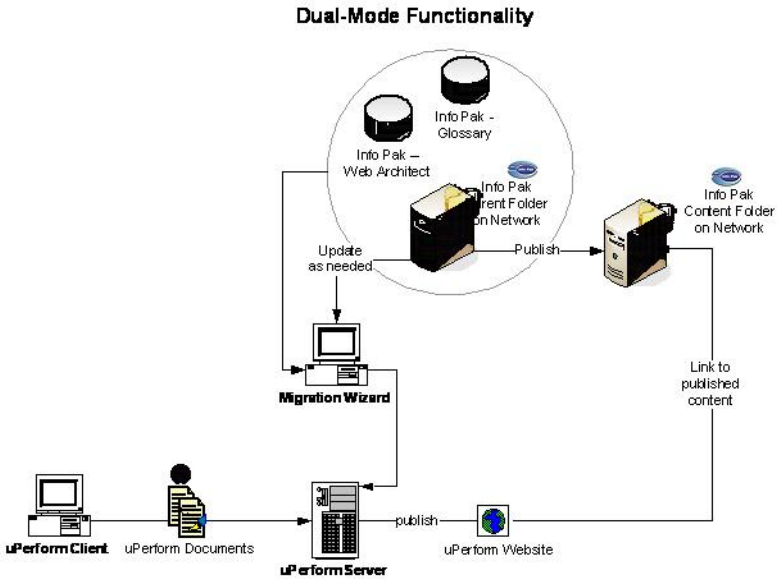
As system changes occur in the application(s) you are documenting, you may elect to transform your Info Pak documents into uPerform documents. After transformation, you can edit the content as necessary. Your new uPerform documents are then checked into the uPerform server and linked to the website.

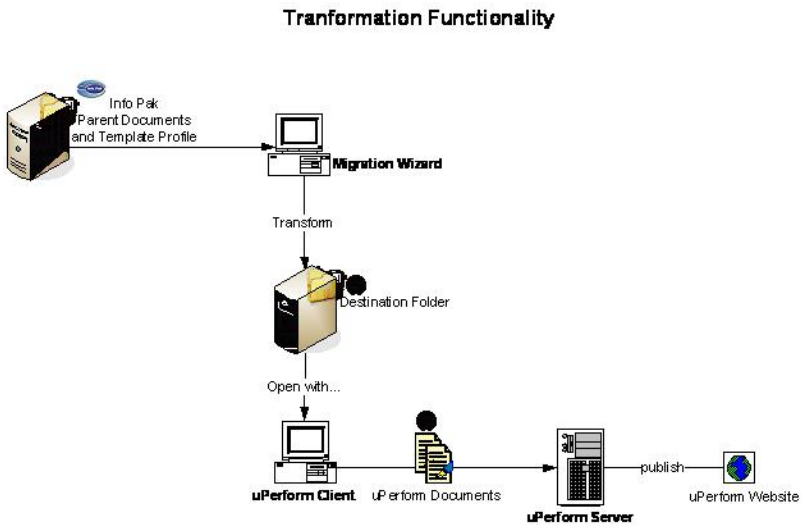
The following is a summary of some best practices you may want to consider as you plan your use of the transformation functionality:

- If you have a relatively small Info Pak content library (for example, less than 100 documents), you may want to transform your existing documents to uPerform and edit the content as necessary. You would then use uPerform to create your website hierarchy, manage glossary terms, and publish content. Going forward, you would create all new content with uPerform.

- If you have a large Info Pak content library, you may want to use the dual-mode functionality to continue to use Info Pak to maintain your existing Info Pak documentation that does not require change. Going forward, you would create all new content in uPerform. You would then publish legacy Info Pak content using Info Pak and publish uPerform content using the uPerform server. Your end result is a unified website of Info Pak and uPerform content for your end users.

The following diagrams provide an overview of the Migration Wizard dual-mode functionality and the transformation functionality.




Tranformation Functionality
Info Pak
Parent Documents
and Template Profile
Migration Wizard
Transform
Destination Folder
Open with...
uPerform Client
uPerform Documents
uPerform Server
publish
uPerform Website

Installing and Uninstalling the Migration Wizard

Installing the Migration Wizard

The Migration Wizard can be installed during installation of the uPerform client software.

You must have an administrator installation of Info Pak 5.51 or higher on your computer in order to install the Migration Wizard.

For detailed information on installing the client, refer to "Getting Started: Creating Content" in the companion manual *Creating Content with ANCILE uPerform.*

Uninstalling the Migration Wizard

To uninstall only the Migration Wizard, perform the following steps:

1. Select **START > SETTINGS > CONTROL PANEL > ADD OR REMOVE PROGRAMS**.
2. Select **ANCILE uPerform Client** from the **Currently installed programs** list.
3. Click **Change**.
4. Select the **Modify** radio button.
5. Click **Next**.
6. Deselect the **Include the Migration Wizard** and **Migration Wizard** checkboxes.
7. Proceed through the remaining uninstall wizard screens.
8. Close the *Add or Remove Programs* window.

For detailed information on uninstalling the client, refer to "Getting Started: Creating Content" in the companion manual *Creating Content with ANCILE uPerform.*

Preparing to Execute the Migration

Migration Prerequisites and Recommendations

Ensure the following required prerequisites are met prior to beginning the migration:

- ❒ The Migration Wizard is installed and ANCILE Info Pak version 5.51 or higher is installed.
- ❒ You have a login to the uPerform server, the server is currently operational, the server is accessible from your computer and a blank project exists on the uPerform server. You must have administrator rights to the project.
- ❒ You have a template assigned to your blank project.
- ❒ You have initialized Info Pak and set your working directory.
- ❒ You have noted the location of your Info Pak parent and content folders.
- ❒ You have noted the location of the Web Architect and Glossary profiles.
- ❒ You have launched the uPerform client.
- ❒ You have noted the location of the Info Pak template profile.
- ❒ All instances of Microsoft Word are closed.
- ❒ Create an **ipcontent** folder in the **[Install Location]\collaboration\www** location, and place your Info Pak content into this folder.

Activities During Web Architect Processing

During migration of Info Pak - Web Architect data, the Migration Wizard gathers document data. The Migration Wizard uses the Web Architect category data and hierarchy information to establish the uPerform document library and website folder structure. The Migration Wizard generates a link to the child output in the same order as the published link priority in Web Architect. This link is activated once the uPerform content verification is run.

Within the uPerform document library, placeholders are created for parent documents. These placeholders will be populated during document check in. The placeholder includes the Info Pak GUID, filename, document title, document type, and version.

Web Architect HTX sets and the information contained within the sets is not migrated to uPerform. Refer to the companion manual, *ANCILE uPerform Administration* for more information on customizing your uPerform server environment.

Activities During Glossary Processing

During migration of Info Pak - Glossary data, the Migration Wizard gathers information about the Glossary base definition for terms and applies this definition at the project level (to apply to only the project selected at the beginning of migration).

The Glossary can be migrated without mapping properties to a context (folder) within the document library, but the Info Pak base definition will become the uPerform project definition and the Info Pak key property-based definitions will become uPerform suggestions.

Multiple migrations to one project are only permitted for the document check in activity. You cannot migrate Web Architect and Glossary data into the same project more than once.

After migration, the Info Pak and uPerform glossaries do not remain synchronized. The migrated data will be applied to uPerform documents only. Info Pak documents only use the Info Pak - Glossary, and the Info Pak - Glossary must be maintained separately if updates to it are required.

After migration, a glossary log is stored in the following default locations: In Windows XP: C:\Documents and Settings\[username]\Application Data\ANCILE\Migration Wizard\Version X.X\Logs\Glossary and in Windows Vista and Windows 7: C:\Users\App Data\Roaming\Migration Wizard\version X.X\Logs\Glossary.

Activities During Document Check-In Processing

The check-in progress uses Microsoft Word to automatically check for and upgrade Info Pak documents to version 5.51. Microsoft Word should not be used until the upgrade process is complete.

The following Info Pak document types can be migrated to uPerform: parent, simulation, an assimilated Microsoft PowerPoint file, an assimilated Microsoft Excel file, an assimilated Microsoft Word file, an assimilated Microsoft Visio file, and an assimilated HTML file. Content is processed in the following manner:

- All simulation files (.ssf) are zipped prior to check in. The zipped file extension is .zsd.
- Assimilated HTML documents and all accompanying files are zipped prior to check in. The extension of the zipped assimilated HTML file is .zhd.
- Assimilated Microsoft Office content is checked in as-is without zipping prior.
- Info Pak parent documents are zipped prior to check in. The extension of the zip file is .zid.

All Microsoft Office documents in the specified parent folder are checked for an Info Pak GUID. Any documents without an Info Pak GUID will not be checked into uPerform except as part of a zip file for an Info Pak document.

Info Pak documents that were not imported into Web Architect will not be included in the uPerform document library structure. However, the Migration Wizard will still detect these files if they are in the parent folder and will upload them directly to the root of the project. You must use uPerform to move these files to the correct location in the document library.

Prior to executing the migration, review the following important points regarding checking Info Pak content into uPerform:

- Only Info Pak content published to a filename can be migrated. If you are publishing Info Pak content to ID or ID_filename, this content cannot be migrated.
- Documents can only be checked into each uPerform server once. If you check documents into the document library of a different project on the server, the migration process will simply increment the version of the documents in the original document library.

A global cascading stylesheet (CSS) file is used to control the appearance of Info Pak documents on the uPerform website. This css file is stored on the uPerform application server at WWW\RWDuPerform01\style. If you made customizations to your Info Pak stylesheet (content.css), you must repeat those customizations in the InfoPakContent.css file. All Info Pak documents linked to from uPerform will use the InfoPakContent.css; you cannot specify a local

stylesheet or omit the stylesheet. For more information on end user website customizations, refer to the companion manual *ANCILE uPerform Administration*.

After migration, you will be prompted to view the log. To view the log, click **Yes**. The check-in log is stored in the following default locations: In Windows XP, C:\Documents and Settings\[username]\Application Data\ANCILE\uPerform\Version X.X\Logs\Checkin, and in Windows Vista and Windows 7, C:\Users\App Data\Roaming\ANCILE\uPerform\Version x.x\Logs\Checkin.

Activities During Template Processing

Before you can transform Info Pak documents and simulations, you must update a uPerform template with Info Pak transformation settings. Updating a template with transformation settings stores various Info Pak settings and if you choose to:

- ❒ Automatically generate the exercise section
- ❒ Transform the procedure section
- ❒ Transform procedure from simulation, if a simulation is available
- ❒ Section mapping used for transformation

When template processing is complete, you can open the template in the uPerform client to view the transformation settings under **GENERAL > INFO PAK SETTINGS**. These settings are not configurable within the uPerform template editor. To make changes to the Info Pak transformation settings, you must use the Migration Wizard.

You must assign the template to the blank project you will use to transform Info Pak documents.

Activities During Document Transformation Processing

During transformation of your Info Pak documents, the Migration Wizard transforms the sections of your Info Pak documents to the sections in a uPerform document. You specify the mapping of sections between Info Pak and uPerform in the initial Migration Wizard configuration.

After the Migration Wizard has completed the transformation processing, you can open the new uPerform documents with the uPerform editor for quality assurance review and editing. In particular, you must edit the procedure section in order to ensure your content displays properly for publication. If you have content that contains a document and a simulation, it is recommended that you edit in the simulation view. Finally, you can check the new uPerform documents into the uPerform server in single or batch mode.

If you previously checked in an Info Pak document for dual-mode functionality and you then transform this document and check it into the uPerform server, your Info Pak document is replaced with the transformed document on the server. The resulting uPerform document receives a new version designator. The website context assigned to the document and any associated discussion content is retained with the transformed uPerform document.

After transformation, you should archive your Info Pak content library and, moving forward, edit the uPerform documents.

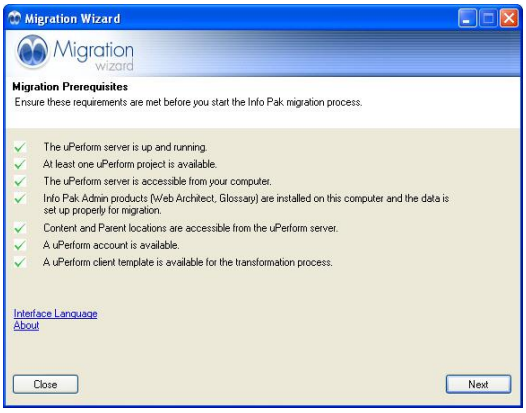
Executing a Migration Run

The Migration Wizard is available from the Microsoft Windows Start menu. The Migration Wizard interface is available in all languages supported by uPerform.

The Migration Wizard will gather information at each step for use in future steps, but no data will be migrated until the Wizard is completed.

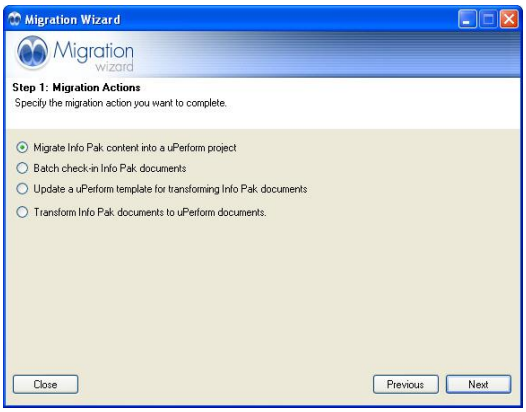
Uploading All Info Pak Data Into uPerform

1. Create an **ipcontent** folder in the **[Install Location]\collaboration\www** location.
2. Place your published Info Pak content into the **ipcontent** folder.
3. Select **START > PROGRAMS > ANCILE UPERFORM > MIGRATION WIZARD** to open the migration wizard.


Migration Wizard
Migration wizard
Migration Prerequisites
Ensure these requirements are met before you start the Info Pak migration process.
The uPerform server is up and running.
At least one uPerform project is available.
The uPerform server is accessible from your computer.
Info Pak Admin products (Web Architect, Glossary) are installed on this computer and the data is set up properly for migration.
Content and Parent locations are accessible from the uPerform server.
A uPerform account is available.
A uPerform client template is available for the transformation process.
Interface Language
About
Close
Next

4. Review the prerequisites and, optionally, specify the interface language.

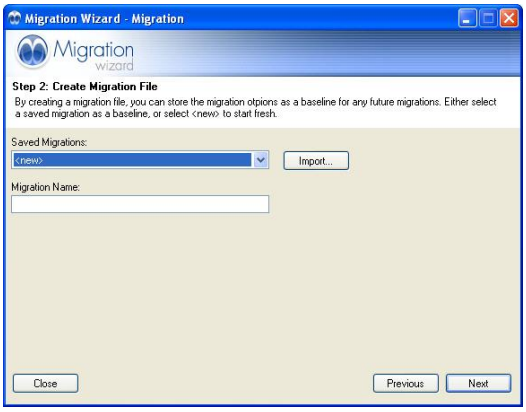
5. Click **Next**.


Migration Wizard
Migration
wizard
Step 1: Migration Actions
Specify the migration action you want to complete.
Migrate Info Pak content into a uPerform project
Batch check-in Info Pak documents
Update a uPerform template for transforming Info Pak documents
Transform Info Pak documents to uPerform documents.
Close
Previous
Next

6. Select one of the following options:

If You Want To	Then
Execute a migration run for the first time	Select the **Migrate Info Pak content into a uPerform project** radio button.
Run a previous migration on a blank project	Select the **Migrate Info Pak Content into a Uperform project** radio button.
Batch check-in Info Pak documents	Select the **Batch check-in Info Pak documents** radio button.
Update a uPerform template for transformation	Select the **Update a uPerform template for transforming Info Pak documents** radio button, and refer to Updating a Template for Use with Transformation (on page 348).
Transform Info Pak documents to uPerform documents	Select the **Transform Info Pak documents to uPerform documents** radio button, and refer to Executing the Transformation (on page 355).

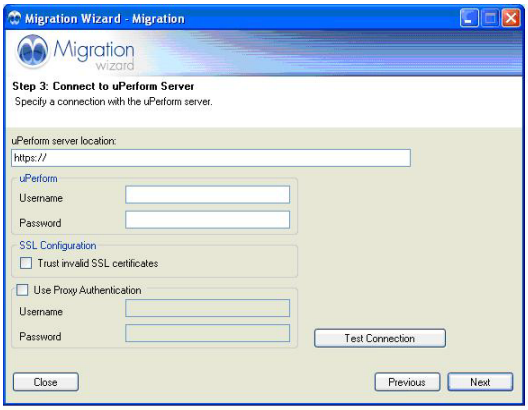
7. Click **Next**.


Migration Wizard - Migration
Migration
wizard
Step 2: Create Migration File
By creating a migration file, you can store the migration otpions as a baseline for any future migrations. Either select a saved migration as a baseline, or select <new> to start fresh.
Saved Migrations:
<new>
Import...
Migration Name:
Close
Previous
Next

8. Perform one of the following options:

If You Want To	Then
Execute a migration for the first time	Select **<new>** from the **Saved Migrations** drop-down list, and enter a name in the **Migration Name** field.
Run a previous migration run on a blank project	Select a project from the **Saved Migrations** drop-down list. Optionally, edit the name in the **Migration Name** field.
Import a migration file from a pre-3.1 version	Select **Import ...**, and specify the file. Optionally, edit the name in the **Migration Name** field.

9. Click **Next**.



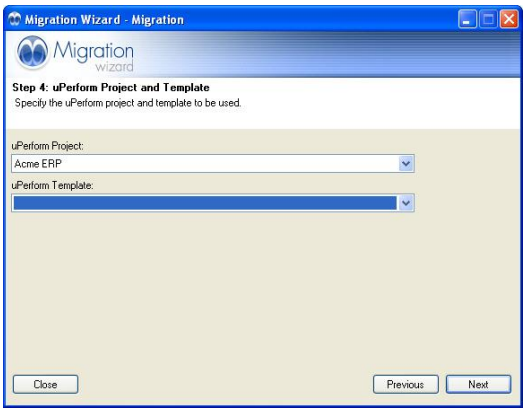
10. Complete the following information:

Field	Description
uPerform server location	Enter the URL of your uPerform server.
Username	Enter the username for the uPerform server.
Password	Enter the password for the uPerform server.
Trust invalid SSL certificates	Select this option if you are using SSL but your certificate is not signed.
Use Proxy Authentication (optional)	Click the **Use Proxy Authentication** checkbox if your administrator has set up a proxy server for connecting to the uPerform server.
Username	Enter the username for the proxy authentication.
Password	Enter the password for the proxy authentication.
Test Connection	Click **Test Connection** to test your connection to uPerform.

Username, password, and proxy authentication are not necessary if using NTLM SSO.

Upon exiting the application, connection information is stored for future use in the Migration Wizard Application Settings XML file located on the local computer in C:\Users\<USER>\AppData\Roaming\ANCILE\MigrationWizard\Version 4.5X\AppSettings.xml.

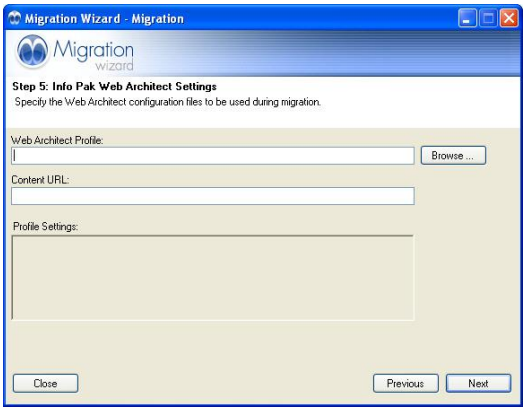
11. Click **Next**.



12. Complete the following fields:

Field	Description
uPerform Project	Select the blank project you created for the migration.
uPerform Template	Select the uPerform template you want to use for transforming documents.

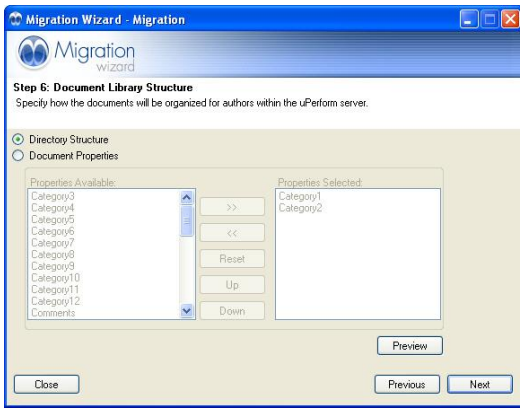
13. Click **Next**.



14. Complete/review the following information:

Field	Description
Web Architect Profile	Browse to the location of your Web Architect profile. Profile .xml files are typically stored in the following locations: For Windows XP: C:\Documents and Settings\[Your Username]\My Documents\Info pak\profiles\wa. For Windows Vista and Windows 7: C:\Users\Documents\Info pak\profiles\wa.
Content URL	Enter the web server location of your published Info Pak content. The Migration Wizard does not validate URLs. For example: http:\\[Install Location]\collaboration\www\ipcontent.
Profile Settings	Review the settings for your Web Architect profile to ensure they are correct.

15. Click **Next**.



16. Choose from the following options:

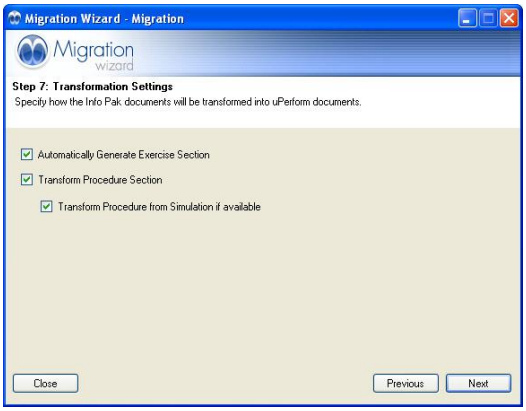
If You Want To	Then
Build the document library based on directory structure	Select the **Directory Structure** radio button, and go to Step 19.
Build the document library based on document properties	Select the **Document Properties** radio button, and go to Step 17.

17. Select the properties to use from the **Properties Available** list, and click >> to move these properties into the **Properties Selected** list on the right. Use the up and down arrow buttons to re-order the list of properties in the **Properties Selected** list.

You must select at least one property.

18. Optionally, click **Preview** to view the document library.

19. Click **Next**.

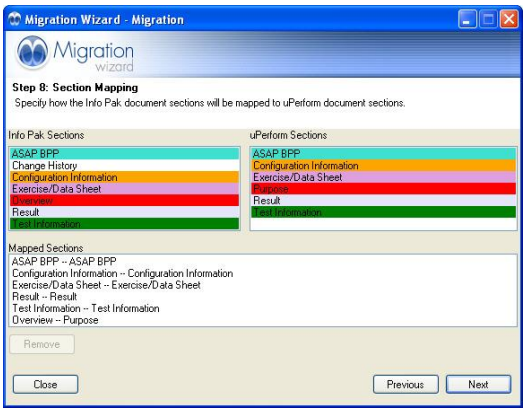


20. Complete the following:

These settings will update your template with the necessary Info Pak properties and allow you to map sections for transformation.

Field	Description
Automatically Generate Exercise Section	Select this option to automatically update the exercise section in the uPerform document after transformation.
Transform Procedure Section	Select this option to transform the procedure section from your Info Pak document into a uPerform document. This option determines if the procedure section in the new uPerform document should be populated based on the Info Pak simulation or document. If this option is disabled, new uPerform documents will not contain any content in the procedure section.
Transform Procedure from Simulation if available	Select this option to transform the procedure section from your Info Pak simulation. **Transform Procedure Section** must be enabled to use this option. To transform an Info Pak procedure section from the simulation, the Info Pak simulation must be in the same directory as the parent document and the file name must be the same. Simulations stored in other directories will not be transformed with the parent document.

21. Click **Next**.



22. Click on a section in the **Info Pak Sections** window.

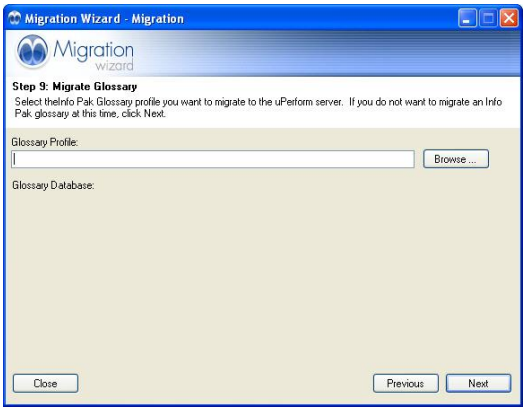
23. Drag and drop the section on the corresponding section in the **uPerform Sections** window.

24. Review the mapped sections to ensure they are correct.

The Info Pak Overview section has been renamed 'Purpose' in uPerform. The procedure section is not included in the mapping options because the Migration Wizard will automatically create this section during transformation.

A section can only be mapped to one other section. Each section has a corresponding color to easily identify the mapping after the drag-and-drop operation. The result of the mapping is displayed in the **Mapped Sections** list. To remove a mapping, click on the mapping in the **Mapped Sections** list and click **Remove**.

25. Click **Next**.


Migration Wizard - Migration
Migration wizard
Step 9: Migrate Glossary
Select theInfo Pak Glossary profile you want to migrate to the uPerform server. If you do not want to migrate an Info Pak glossary at this time, click Next.
Glossary Profile:
Browse ...
Glossary Database:
Close
Previous
Next

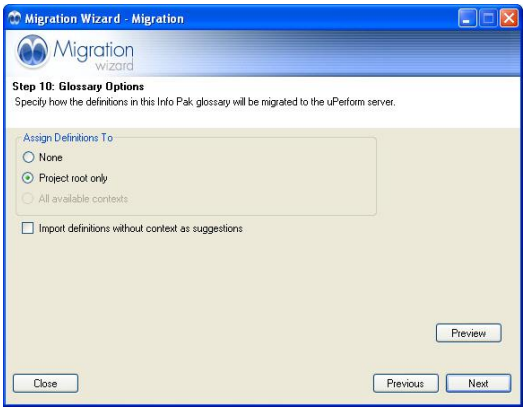
26. Perform one of the following options:

If You Want To	Then
Migrate your Info Pak glossary	Go to Step 27.
Skip the Info Pak glossary and proceed with the migration	Click **Next**, and go to Step 29.

27. Browse to the location of your Glossary profile.

Profile .xml files are typically stored at C:\Documents and Settings\[Your Username]\My Documents\Info pak\profiles\glossary.

28. Click **Next**.



29. Select from the following options:

If You Want To	Then
Migrate no definitions	Select the **None** radio button.
Assign Info Pak default definitions to the project root only	Select the **Project root only** checkbox.
Map any key-property specific definitions to folders in the document library	Select the **All available contexts** radio button. This option is not available if the Info Pak Glossary is based on language.
Ensure that all Info Pak - Glossary definitions are added to uPerform, but you have no key properties that match document library folders	Select the **Import definitions without context as suggestions** checkbox. The Info Pak - Glossary key property definition that does not match a context in uPerform will be added as a suggestion at the project level.

If your Info Pak - Glossary key property is not language, you must select the uPerform language that should be used for the Info Pak - Glossary definitions.

30. Click **Next**.

31. Review the summary list.

32. Click **Start** to begin the migration process.

Microsoft Word should not be used until the migration process is complete. During the migration process, the screen displays the percent complete status of the process. To cancel the process, click **Stop**. Stopping the process applies to the document check-in process and Glossary processing, but does not 'undo' documents that were already checked in. A confirmation and status message is displayed at the end of the migration run. From this message, you can access a log of migration activities during the run.

33. If you want to transform your Info Pak documents to uPerform documents, refer to Transforming Info Pak Documents (see "Transforming Info Pak Documents and Simulations" on page 355).

Migrating Info Pak Documents to the uPerform Document Library

This activity does not migrate Web Architect or Glossary data. If the Web Architect database has already been migrated, documents will be checked into the correct location in uPerform; otherwise, the documents will be checked into the project root.

1. Select **START > PROGRAMS > ANCILE UPERFORM > MIGRATION WIZARD** to open the Migration Wizard.

2. Review the prerequisites and, optionally, specify the interface language.

3. Click **Next**.

4. Select **Batch check-in Info Pak documents**.

5. Click **Next**.

6. Complete the following information:

Field	Description
uPerform server location	Enter the URL of your uPerform server.
Username	Enter the username for the uPerform server.
Password	Enter the password for the uPerform server.
Use Proxy Authentication (optional)	Click the **Use Proxy Authentication** checkbox if your administrator has set up a proxy server for connecting to the uPerform server.
Trust Invalid SSL Certificates	Select this option if you are using SSL but your certificate is not signed.
Username	Enter the username for the proxy authentication.
Password	Enter the password for the proxy authentication.

7. Click **Next**.

8. Select a project from the **uPerform Project** drop-down list.

9. Click **Next**.

10. Click **Browse...** to specify an inbox.

11. Click **Start** to begin the check-in process.

The check-in progress screen displays the percent complete status of the process. To cancel the process, click **Stop**. Stopping the process does not 'undo' documents that were already checked in. A confirmation and status message is displayed at the end of the migration run. From this message, you can access a log of migration activities during the run.

Published content child toolbar links in uPerform do not match Info Pak Web Architect priority links.

Updating a Template for Use with Transformation

You can update a template to populate the template with Info Pak transformation settings or update existing transformation settings.

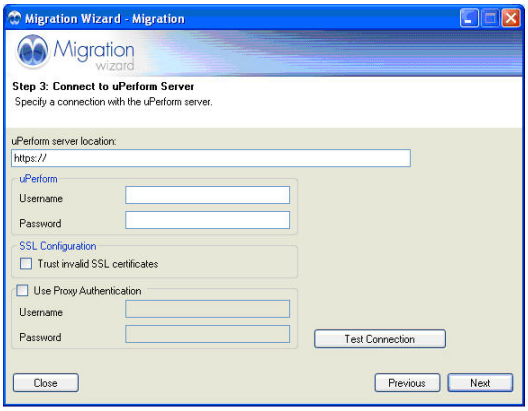
1. Select **START > PROGRAMS > ANCILE UPERFORM > MIGRATION WIZARD** to open the Migration Wizard.

2. Review the prerequisites and, optionally, specify the interface language.

3. Click **Next**.

4. Select **Update a uPerform template for transforming Info Pak documents**.

5. Click **Next**.

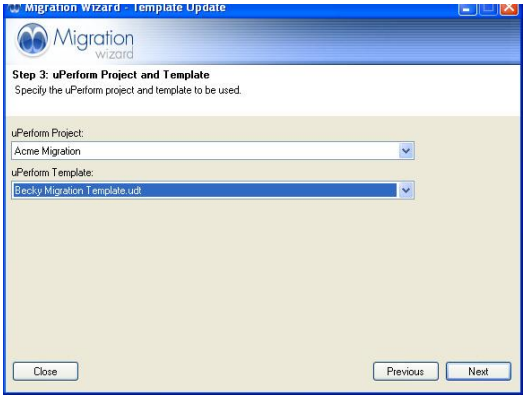


6. Complete the following information:

Field	Description
uPerform server location	Enter the URL of your uPerform server.
Username	Enter the username for the uPerform server.
Password	Enter the password for the uPerform server.
Trust invalid SSL certificates.	Select this option if you are using SSL but your certificate is not signed.
Use Proxy Authentication (optional)	Click the **Use Proxy Authentication** checkbox if your administrator has set up a proxy server for connecting to the uPerform server.
Username	Enter the username for the proxy authentication.
Password	Enter the password for the proxy authentication.
Test Connection	Click **Test Connection** to test your connection to the uPerform server.

Upon exiting the application, connection information is stored for future use in the Migration Wizard Application Settings XML file located on the local computer in C:\Users\<USER>\AppData\Roaming\ANCILE\MigrationWizard\Version 4.5X\AppSettings.xml.

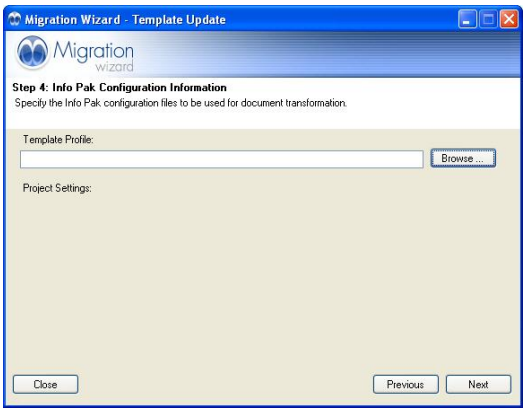
7. Click **Next**.



8. Complete the following fields:

Field	Description
uPerform Project	Select the project that contains the template you want to update.
uPerform Template	Select the template you want to update with the transformation.

9. Click **Next**.



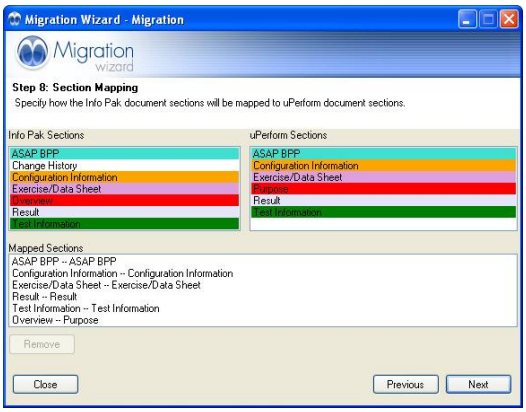
10. Click **Browse**, and locate the Info Pak profile you want to use to update the template.

11. Click **Next**.

12. Complete the following:

Field	Description
Automatically Generate Exercise Section	Select this option to automatically update the exercise section in the uPerform document after transformation.
Transform Procedure Section	Select this option to transform the procedure section from your Info Pak document into a uPerform document. This option determines if the procedure section in the new uPerform document should be populated based on the Info Pak simulation or document. If this option is disabled, new uPerform documents will not contain any content in the procedure section.
Transform Procedure from Simulation if available	Select this option to transform the procedure section from your Info Pak simulation. **Transform Procedure Section** must be enabled to use this option. To transform an Info Pak procedure section from the simulation, the Info Pak simulation must be in the same directory as the parent document and the file name must be the same. Simulations stored in other directories will not be transformed with the parent document.

13. Click **Next**.



14. Click on a section in the **Info Pak Sections** window.

15. Drag and drop the section on a corresponding section in the **uPerform Sections** window.

16. Review the mapped sections to ensure they are correct.

The Info Pak Overview section has been renamed 'Purpose' in uPerform. The procedure section is not included in the mapping options because the Migration Wizard will automatically create this section during transformation.

A section can only be mapped to one other section. Each section has a corresponding color to easily identify the mapping after the drag-and-drop operation. The result of the mapping is displayed in the **Mapped Sections** list. To remove a mapping, click on the mapping in the **Mapped Sections** list and click **Remove**.

17. Click **Next**.

18. Review the summary information.

19. Click **Start**.

When the template update is complete, you can choose to view the transformation log.

Reviewing the Migration Results

In uPerform, migrated Info Pak documents are displayed with a unique icon. In addition, the Info Pak document titles include the associated document type within uPerform.

The document type displayed after the title is based on the DocType_Name property of the original Info Pak document.

The Migration Wizard automatically verifies content from the uPerform server workspace. Running content verification activates the Info Pak child output on the uPerform server.

This process may take several minutes after the migration is complete.

Optionally, if you want to execute content verification on a regular basis, use Microsoft Windows Task Scheduler to setup a task on the server to periodically execute the ContentVerification.exe file. Refer to the *ANCILE uPerform Administration* user manual for instructions on creating tasks on the server.

After migration is complete, perform the following quality assurance and configuration tasks:

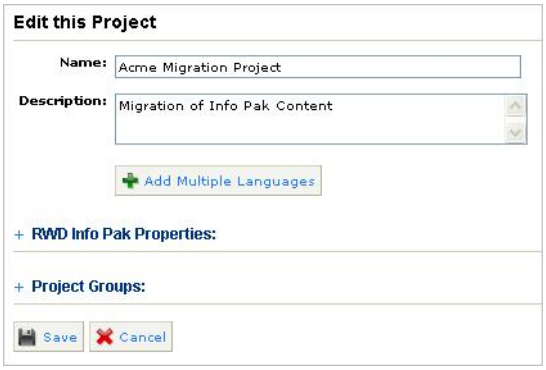
- Review the document check-in log (generated if you have checked documents into uPerform). This log is located in the following default locations: In Windows XP, C:\Documents and Settings\[Your Username]\Application Data\ANCILE\uPerform\Version X.X\Logs\BatchCheckin, and in Windows Vista, C:\Users\App Data\Roaming\ANCILE\uPerform\Version X.X\Logs\BatchCheckin. The log filename is prefaced with 'BatchCheckIn_' and is date- and timestamped.

- Confirm that unintended documents have not been migrated.

- Confirm the folder assignment of all documents.

Using the Info Pak Properties Specified in the uPerform Project

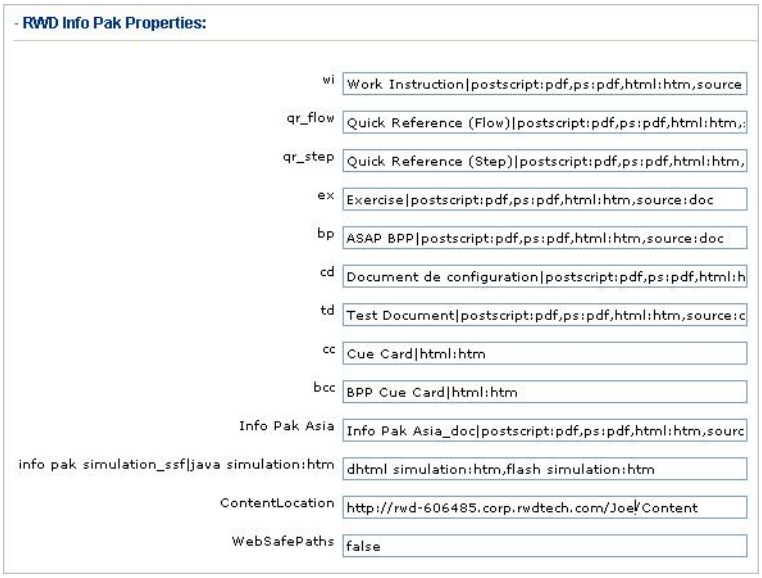
After migration, a link to Info Pak properties is displayed on the project properties page.



These Info Pak properties only exist after importing Web Architect data during migration. After initial creation, these properties can only be modified from the uPerform system.

If you are not modifying your Info Pak publishing options (for example, specifying to use websafe paths or specifying additional output formats) and the location of the published output does not change, you do not need to edit these Info Pak properties from within uPerform.

If your publishing options or location change, you must edit these properties. Click + to the left of **ANCILE Info Pak Properties** to expand the properties list.



In the event you do modify publishing options and/or content location, you must modify the following properties:

- The relevant child document type to add formats to the list
- Content Location: You do not need to re-migrate data again if the content location is changed. Simply change the value of this field and run content verification.
- Web Safe Paths: Change the value in this field if all documents are republished with a different websafe path setting in the Info Pak - Configuration tool and run content verification.

You cannot add new custom child document types or new assimilated document types from this interface. If you have new document types, you must execute a new migration.

Executing the Transformation

The Migration Wizard is available from the Microsoft Windows Start menu. The Migration Wizard interface is available in all languages supported by uPerform.

The Migration Wizard will gather information at each step for use in future steps, but no transformation activities will occur until the Wizard is completed.

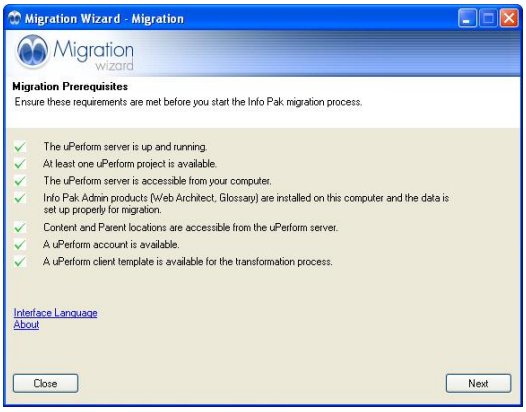
If you are using multiple Info Pak project settings files, it is recommended that you create and specify a unique uPerform template for each transformation run. If you have created custom sections for use in your Info Pak documents, you must also create these custom sections in your uPerform template.

Info Pak screenflows are not transformed to uPerform documents.

Transforming Info Pak Documents and Simulations

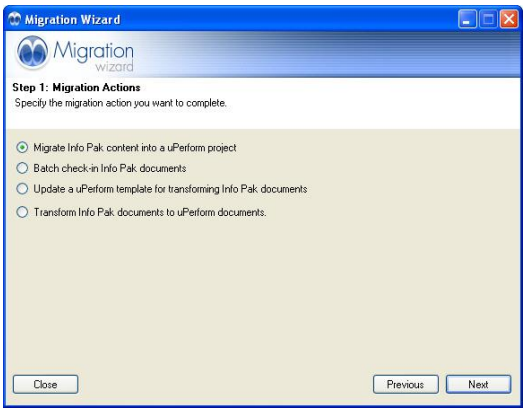
For information on best practices in planning and executing the transformation, refer to the *Transitioning from ANCILE Info Pak to ANCILE uPerform* white paper on the Product Support Center at https://products.ancile.com.

1. Select **START > PROGRAMS > ANCILE UPERFORM > MIGRATION WIZARD** to open the migration wizard.


Migration Wizard - Migration
Migration
wizard
Migration Prerequisites
Ensure these requirements are met before you start the Info Pak migration process.
The uPerform server is up and running.
At least one uPerform project is available.
The uPerform server is accessible from your computer.
Info Pak Admin products (Web Architect, Glossary) are installed on this computer and the data is set up properly for migration.
Content and Parent locations are accessible from the uPerform server.
A uPerform account is available.
A uPerform client template is available for the transformation process.
Interface Language
About
Close
Next

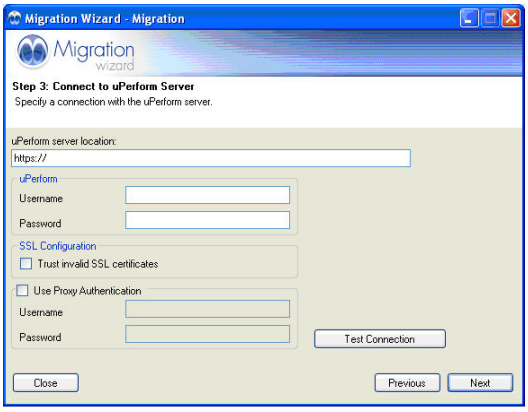
2. Review the prerequisites and, optionally, specify the interface language.

3. Click **Next**.


Migration Wizard
Migration
wizard
Step 1: Migration Actions
Specify the migration action you want to complete.
Migrate Info Pak content into a uPerform project
Batch check-in Info Pak documents
Update a uPerform template for transforming Info Pak documents
Transform Info Pak documents to uPerform documents.
Close
Previous
Next

4. Select the **Transform Info Pak documents to uPerform documents** radio button.

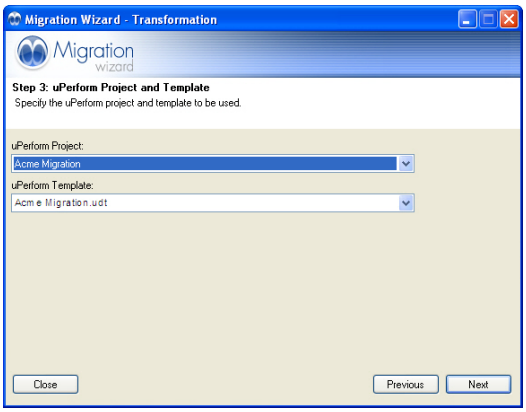
5. Click **Next**.



6. Complete the following information:

Field	Description
uPerform server location	Enter the URL of your uPerform server.
Username	Enter the username for the uPerform server.
Password	Enter the password for the uPerform server.
Select **Trust invalid SSL certificates**.	Select this option if you are using SSL but your certificate is not signed.
Use Proxy Authentication (optional)	Click the **Use Proxy Authentication** checkbox if your administrator has set up a proxy server for connecting to the uPerform server.
Username	Enter the username for the proxy authentication.
Password	Enter the password for the proxy authentication.

7. Click **Next**.

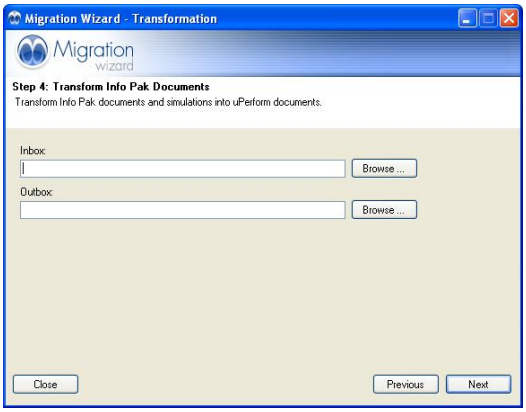


8. Select the project from the **uPerform Project** list.

9. Select a template from the **uPerform Template** list.

Only those templates containing Info Pak properties needed to perform a transformation are displayed. For more information, refer to Migrating Info Pak Documents to the uPerform Document Library (on page 347).

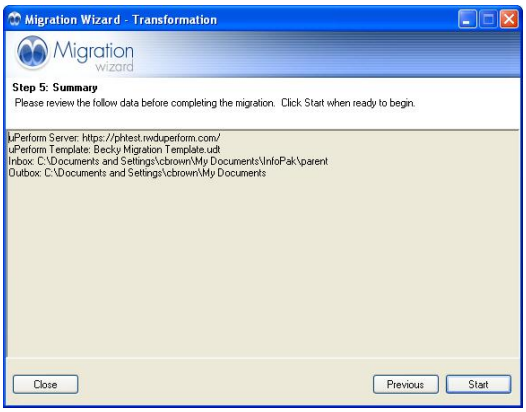
10. Click **Next**.



11. Complete the following information:

Field	Description
Inbox	Browse to the location of your Info Pak documents and simulations.
Outbox	Specify the location to which the new uPerform documents will be saved.

12. Click **Next**.


Migration Wizard - Transformation
Migration wizard
Step 5: Summary
Please review the follow data before completing the migration. Click Start when ready to begin.
uPerform Server: https://phtest.nwduperform.com/
uPerform Template: Becky Migration Template.udt
Inbox: C:\Documents and Settings\cbrown\My Documents\InfoPak\parent
Outbox: C:\Documents and Settings\cbrown\My Documents
Close
Previous
Start

13. Click **Start** to begin the transformation process.

14. If prompted, click **Yes** to close all instances of Microsoft Word.

The transformation progress screen displays the status of the process. To cancel the process, click **Cancel**. Stopping the process applies to the current document, but does not 'undo' documents that were already transformed. A confirmation message is displayed at the end of the transformation run. From this message, you can access a log of transformation activities during the run.

15. Browse to the outbox location you specified for your uPerform documents to review and edit the documents with the editor.

When the transformation process is complete, you will be prompted to view the transformation log. To view the log, click **Yes**. The transformation Log is stored in the default locations: In Windows XP, C:\Documents and Settings\[username]\Application Data\ANCILE\Migration Wizard\Version X.X\Logs\Transformation, and in Windows Vista and Windows 7, C:\Users\App Data\Roaming\ANCILE\Migration Wizard\VersionX.X\Logs\Transformation.

16. Edit the document(s) using the procedures and information found in Reviewing and Editing Transformed Info Pak Documents (see "Reviewing and Editing Transformed Documents and Simulations" on page 360).

Transforming a Single Info Pak Document or Simulation

You can transform a single Info Pak document or simulation using the uPerform client. Single document transformation can be performed in connected or disconnected mode. If you are working in disconnected mode, ensure you have a local template containing Info Pak transformation properties.

For information on best practices in planning and executing the transformation, refer to the *Transitioning from ANCILE Info Pak to ANCILE uPerform* white paper on the ANCILE Product Support Center at https://products.ancile.com.

1. Open the uPerform client.
2. Select **FILE > OPEN**.
3. Change **File of types** to **Info Pak Document** or **Info Pak Simulation**.
4. Navigate to the Info Pak file.
5. Click **OK**.
6. Select a template from the list.

   Only those templates containing Info Pak properties needed to perform a transformation are displayed. For more information, refer to Migrating Info Pak Documents to the uPerform Document Library (on page 347).

7. Click **OK**.

   This process may take several minutes.

8. Edit the document using the procedures and information found in Reviewing and Editing Transformed Info Pak Documents (see "Reviewing and Editing Transformed Documents and Simulations" on page 360).

Reviewing and Editing Transformed Documents and Simulations

Once you have transformed an Info Pak document or simulation to a uPerform document or simulation, you must review the document to ensure proper formatting and content display. After transformation, your content will be displayed using uPerform styles.

Reviewing and Editing Transformations

The following styles are lost when converting Info Pak documents: character scale, outline, shading, and doublestrike.

The following list provides information on areas that may need particular attention:

Highly customized Info Pak documents will require more extensive quality reviews. Highly customized documents include, but are not limited to manually inserted tables and steps, an extensive Info Pak glossary, and notes inserted after screenshots.

- Hotspots: During transformation, hot spot images are located and an image of the hotspot (for example:

) is placed into the document to help you determine the hotspot location. If you are working with content that contains a document and a simulation, the hotspot should be edited in the simulation view. Once you have specified the hotspot, you can delete the image.

- Menus: During transformation, Info Pak images are located and the menu path is specified in the associated step. If you are working with content that contains a document and a simulation, the menu image should be edited in the simulation view.

- Customized Step Text for Field/Description and If Then/Go To Tables: Any customized step text inserted into tables will be inserted into the uPerform documents as a step above the table. uPerform tables cannot contain custom step text and the table must be modified within the document, or changed globally within the template.

- Action Notes: Info Pak action notes that have been modified will be added as regular notes in the uPerform document. The new note will match the step text.

- Notes: An Info Pak note inserted between a screenshot and a step will be inserted below the first step after the screen shot in the uPerform document.

- Field/Description Tables: Info Pak images and notes in field/description tables will transform only from the description column. Notes and images are not allowed in the field column within uPerform. You must identify the proper place for these images or notes from the field column and manually insert these into the uPerform document.

- Customized action note text: During transformation, step text and action note text is compared to determine if the text is the same for both; if it is not, a note containing the action note text is inserted into the step, pointing to the hotspot. During quality review, the author can choose which note to keep or edit the notes accordingly.

- Values in simulations: If the value is set to the lesson default, it is transformed to use the uPerform default stored in the template. Affected values include: case sensitivity, auto playback timing, help text, and playback color

Editing Transformed Info Pak Documents

For more information, refer to refer to "Editing and Formatting Basics" and "Editing and Formatting: Procedural Content" in the companion manual *Creating Content with ANCILE uPerform.*

Glossary of Terms

Author
A user who creates or edits content.

Context
Functionality that allows you to manually create a website structure by assigning website folders to content within the document library.

Course
A collection of informational content and optional assessment tools such as multiple choice, drag-and-drop, and fill-in-the-blank.

Course Package
A container for multiple uPerform content files output to a single master SCORM package.

Definition
Within the glossary functionality, amplifying information about a term used in the target application. A term can have multiple definitions based on the context of the document.

Document
A set of instructions, images, and associated objects intended for use as online help or performance support.

Editor
The application used to create and modify uPerform content.

End User
Any person who accesses performance support content through a website.

Flash
A file format developed by Adobe; this output type is used to display content within uPerform courses and simulations.

Glossary
The uPerform function that enables the management of terms and definitions. Also, the name of an ANCILE Info Pak application.

Guided Help
Published HTML content designed to be used during task execution.

Info Pak
An ANCILE product; includes Publisher, Web Architect, Glossary, and Help Launchpad components.

Migration
The process of moving your Info Pak project(s) to uPerform.

Migration Wizard
A tool that allows you to migrate your Info Pak project(s) to uPerform, or transform your Info Pak documents to uPerform documents.

Parent Document
A legacy document created by ANCILE Info Pak that can contain a screenflow, a BPP, procedural information, configuration information, and testing information for a process or transaction. The published child output of a parent document can be linked to display on the uPerform website.

Publication
Output published from uPerform content; a publication is meant to be consumed by an end user.

Publish
A process that exports content to a variety of types and formats, including cue card and Flash simulation. Authors can publish locally to preview content, and administrators manage the server publish queue to make content available to users.

Recorder
The uPerform functionality that captures author actions in one or more target applications to produce a formatted document, simulation, and screenflow.

Simulation
A set of instructions, images, and associated objects intended for export as interactive output.

Skin
The skin files define the style of the uPerform interface elements. Using skins, you can change the colors of the interface areas, set new fonts properties, use different images for icons in the interface, etc.

Student Guide
A collection of concepts, procedures, and exercises related to a series of tasks or a process.

Suggestion
A proposed alternate definition entered by an author for evaluation as a potential new glossary definition.

Template

A set of document, simulation, and course options that control formatting and content. Each content file is created from a template which determines the basic structure for content and specifies the content settings. The template also specifies information about the types and formats of content that can be published.

Term

The name of a field or option in the target application being documented. A term can have one or more definitions.

Transformation

The process of converting Info Pak documents to uPerform documents.

Translation

uPerform content that has been translated from the original. Translated content retains a link to the original. In versions prior to 2.1, translated content was referred to as Associated Content.

uPerform Document

The XML content produced by uPerform as a result of recording author actions in a target application; includes the document, simulation, and screenflow views.

uPerform Editor

The application used to create, record, and modify documents, simulations, and courses.

uPerform Server

The application used to store, manage, and distribute documents, simulation, and courses.

User

The consumer of final published content via online help or the website.

User Information Source

Allows you to import and synchronize users into uPerform from an external data source.

View

A way of displaying content to an author or user; there are four views of uPerform content available: document, simulation, screenflow, and course.

Web Architect

The name of an ANCILE Info Pak application. Web Architect database information can be imported into uPerform to develop the initial website structure.

Website

A collection of performance support materials such as procedures, simulations, and courses that are available to end users via a web browser.

Workspace

The application interfaces available to authors and administrators to provide access to content creation and management functions.

XML

Extensible Markup Language; the source format of uPerform content.

XSL

Extensible Stylesheet Language; the file used to control the format of the content displayed in an XML file.

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